

Essential Functions Worksheet

FAQ's and Instructions for Completion of the Form

Q. What is the purpose of the Essential Functions Worksheet (EFW)?

A. The County utilizes EFWs in a number of ways:

- Job Bulletins for hiring,
- Post-Offer Pre-Employment physicals,
- Fitness For Duty examinations,
- Disability Retirement determinations,
- Temporary Transitional Duty cases,
- ADA Reasonable Accommodation cases,
- Worker's Compensation cases, and
- Long Term Disability eligibility.

Q. If one assignment in a job class performs an essential function such as billing and another assignment does not, is billing listed in the essential function?

A. Yes. The EFW reflects the whole job class. Assignments specific to one individual should be listed using a range of hours that the task requires in a week. For example, if billing is done by one individual for 10 hours a week, the range would be listed as 0-10. Zero would represent everyone who does not do billing, and 10 would represent the task hours for the individual assigned to handle billing.

Q. Do you ever need to fill out more than one EFW for a job class?

A. Yes, if the requirements of a position vary significantly from those of other positions in the class. For example, a Public Health Assistant who inspects swimming pools should have a different EFW from a Public Health Assistant who performs HIV test counseling.

Q. What are the "Medical Provider Use Only" areas used for?

A. These areas will be completed by a medical provider when evaluating an employee for a post-offer pre-employment physical and/or for an injury or medical condition.

Instructions for Completion of the EFW Form

The form may be revised as needed.

1. Essential Functions:

List all essential functions in the first column, including details on the critical physical, mental and emotional factors. These details assist medical providers in evaluating an employee's ability to perform each essential function and/or to set work restrictions, where appropriate. Rows may be deleted or added to complete the Section as needed.

In the second column, list the range of hours the task is performed in a week. *The total does not have to equal 40 hours a week.* Infrequent functions are still considered essential if serious consequences result from non-performance even if the function is performed intermittently (e.g., tasks required during a flood, an election, or year-end tasks).

If required, indicate the knowledge base or level of expertise, and the necessity of staying current in the field (e.g., Child Welfare Code, or Nursing Certification).

Job classes with multiple levels such as I/II and/or III as a lead person, may be listed on one EFW form.

2. Typical Job Duties/Tasks and Physical/Environmental Factors:

Complete by using the **frequency definitions** listed after Section 1.

3. Lifting and Carrying:

Check the appropriate box for frequency of occurrence using the **frequency definitions** listed after Section 1. Make a note in the space provided above the table if items lifted are:

- awkward or unusual (e.g., poles of up to 17 ft. in length and that weigh up to 35 lbs. or loose bags of material weighing up to 50 lbs), and/or
- carried under "non-standard" conditions (i.e., at waist height over level, dry ground).

4. Sensory:

Check if required in the County Job Description.

5. Mental Activities:

Check all that apply.

6. Other:

Check if required in County Job Description. (Note: Cal OSHA Regulation 8, Section 5193 requires the County to make the Hepatitis B vaccination available to anyone exposed. However, an employee has the right to refuse the vaccination.)

7. Supervisor's/Manager's Comments:

Supervisors and/or managers can use this section to clarify/explain any item(s) in the preceding sections that need in-depth discussion (e.g., emotional stressors or unique physical environments).

8. Medical Provider's Comments & Signature:

The medical provider use this section to provide the name of the employee being evaluated, to clarify/explain the information provided in the preceding sections, as necessary, and to sign the form.

9. County Form Review Signatures:

You may submit electronic EFWs by typing your name where your signature as indicated and forwarding to the next reviewer by email. The final version will be housed with Human Resources.

Essential Functions Worksheet

JOB CLASS:	DEPT:	DIVISION:
JOB CLASS #:	DEPT #:	DIVISION #:

INSTRUCTIONS TO MEDICAL PROVIDERS COMPLETING THIS FORM: Please use the “Medical Provider Use Only” columns at the right and/or the “Medical Provider’s Comments & Signature” Section (Section 8) to provide work restrictions by:

- indicating whether there is some portion of each function that the employee can perform,
- designating whether each restriction is temporary (T) or permanent (P), and
- stipulating the expected duration of any temporary work restriction(s).

To finalize the form, provide the name of the employee evaluated and additional comments, as appropriate, then sign and date where indicated in the “Medical Provider’s Comments & Signature” Section (Section 8).

Section 1. ESSENTIAL FUNCTIONS (Specific Skills Required For the Job Class):

Note: The usual number of hours per week does not have to equal 40.

Essential Functions cannot be reassigned to another employee or modified without causing significant work disruption.	Usual Number of Hours a week	Medical Provider Use Only <i>Please indicate whether Temporary (T) or Permanent (P)</i>		
		Employee Can Perform	T	P
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				

FREQUENCY DEFINITIONS FOR SECTIONS TWO AND THREE THAT FOLLOW

The table below contains definitions for frequency rates typically required for the physical and environmental activities and lifting requirements listed in Sections 2 and 3. **Note: Time ranges listed below are approximate and may overlap with those of other activities so they may total more than 40 hours in a week.**

FREQUENCY RANKING	PERCENT OF TIME	RANGE OF HOURS WORKED GIVEN LENGTH OF SHIFT:			
		8 HOURS	9 HOURS	10 HOURS	12 HOURS
Not Required Or Never (NR)					
Occasionally (O)	0 - 33%	0 to 2.5	0 to 3	0 to 3.5	0 to 4
Frequently (F)	34 - 66%	2.5 to 5.5	3 to 6	3.5 to 7	4 to 8
Continuously (C)	67 - 100%	5.5 to 8	6 to 9	7 to 10	8 to 12

Section 2. TYPICAL JOB DUTIES / TASKS:

PHYSICAL					ENVIRONMENTAL				
FUNCTIONAL ACTIVITIES TOTAL DOES NOT HAVE TO EQUAL 40 HOURS	MAXIMUM REQUIRED FREQUENCY PER DAY	Medical Provider Use Only			FUNCTIONAL ACTIVITIES TOTAL DOES NOT HAVE TO EQUAL 40 HOURS	MAXIMUM REQUIRED FREQUENCY PER DAY	Medical Provider Use Only		
		EMPLOYEE CAN PERFORM	T	P			EMPLOYEE CAN PERFORM	T	P
Use of Keyboard, Sporadic 10-Key					Work Inside				
Use of Mouse (or alternative input device)					Work Outside				
					Work Closely with Others				
Finger Manipulation (continuous 10-key, handwriting)					Work Alone				
					Unprotected Heights: (rooftop, loading dock, ladder, stairs)				
Wrist Turning (locking/unlocking, door knob, screwdriver)					Work Around Moving Machinery: (traffic, electric. lift, tractor, presses)				
Grasping or Pinching (firm)					Exposure to Marked Changes in Temperature & Humidity (outside temp 28 – 110°)				
Pushing/Pulling									
Telephone Use (if without headset check here <input type="checkbox"/>)					Exposure to Dust, Fumes, Smoke, Gases, or Other Irritating Substances (paint, glue)				
Neck Motion (Left/Right, Up/Down)					Exposure to Slippery or Uneven Walking Surfaces (construction obstacles, mud, undeveloped ground)				
Reaching Forward									
Reaching Above Shoulder					Exposure to Solvents or Chemicals				
Sitting (can stand at will)									
Standing (static) (working at counter)					Vibration (chainsaws, jack hammers, jig saws, sanders)				
Walking									
Twisting Spine					Exposure to Excess Noise				
Repetitive Bending					Work with Explosive or Exposure to Electrical Energy				
Stair Climbing					Work with Hands in Water or Other Substance				
Ladder/Stepstool (used as a tool)					Work Below Ground: (basement, excavation, trench)				
Kneeling					Drive Material Handling or Cleaning Equipment (forklift, hand truck)				
Squatting (unloaded, two knees)									
Stooping (one knee)					Work in a Fixed POST Assignment. (May not leave without having replacement employee cover assignment – 911 Emergency Dispatch, Correctional Officer)				
Crawling									
Driving									
Operation of Hand or Foot Controls									

Section 3. LIFTING AND CARRYING:

Assumes walking on level ground in dry conditions and carrying at waist height. Please note awkward, oversized, or non-static items below.

Notes	WEIGHT	NOT REQUIRED	OCCASIONALLY	FREQUENTLY	CONTINUOUSLY	Medical Provider Use Only		
						Employee Can Perform		
						T	P	
	0 - 10 lbs							
	11 - 20 lbs							
	21 - 35 lbs							
	36 - 50 lbs							
	51 - 75 lbs							
	76 - 100+ lbs							

Section 4. SENSORY:

This position requires:	Medical Provider Use Only		
	Employee Can Perform	T	P
Functional vision, normal or corrected <input type="checkbox"/> Yes <input type="checkbox"/> No			
Functional color vision, normal or corrected <input type="checkbox"/> Yes <input type="checkbox"/> No			
Functional night vision, normal or corrected <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Doesn't work nights			
Functional hearing, normal or corrected <input type="checkbox"/> Yes <input type="checkbox"/> No			
Functional speech <input type="checkbox"/> Yes <input type="checkbox"/> No			
A sense of smell or taste <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable			

Section 5. MENTAL ACTIVITIES:

Check all that apply	Skill Level Required For This Job Class:	Medical Provider Use Only		
		Employee Can Perform	T	P
Comprehension Level:				
	Follow instructions received orally			
	Follow instructions received in writing			
	Frequently required to sustain concentration			
Nature of Tasks:				
	Follow set procedures or set sequences			
	Organize own work			
	Ask questions or request assistance when needed			
	On-Call and emergency work			
Work Pace:				
	Deal with emergency and time sensitive situations on an ongoing basis			
	Tightly scheduled and hurried pace of work activities			
	Require precise attention to detail			
	Meet frequent project deadlines			
	Long and irregular hours			
	Limited opportunity for breaks			
Required to Perform Complex or Varied Tasks:				
	Attention divided between issues requiring multi-tasking			
	Frequent use of judgment on routine matters			
	Situations requiring judgment and adaptation of procedures from one task to another			
Required to Relate to People:				
	Frequently works with others (co-workers, professionals, public)			
	Face to face interaction with others			
	Interaction exceeds giving /receiving of instructions			
	Able to perform under circumstances of emotional stress			
	Risk of confrontation with violent or assaultive customers			
	Diffuse residual emotional effects when crisis is over			
Required to Influence People:				
	Negotiate, motivate, redirect, or convince others			
Required to Make Generalizations, Evaluations, or Decisions without Supervision:				
	Ability to make quick accurate decisions			
	Expected to make decisions without supervision			
	Evaluate or make decisions based on experience or knowledge			
Required to Accept and Carry Out Responsibility for Direction, Control and Planning:				
	Lead person – act as supervisor in Supervisor's absence, has broad technical knowledge			
	Supervise other employees			
	Ability to train others			
	Goal setting and planning for others is an integral part of the position			
	Responsible for results			

