



ESSENTIAL JOB FUNCTION WORKSHEET

Use this before writing or revising a job description.



Sorting a role's functions into essential and marginal is the step most job descriptions skip, and it is the step that makes everything downstream easier — accommodation conversations, classification decisions, and explaining a hiring call six months after you made it.

Work through it once per role. It takes about twenty minutes and is reusable every time the job changes.

What Makes A Function Essential

A function is essential for any of three reasons, drawn from the EEOC regulations at 29 CFR 1630.2(n):

- The position exists in order to perform it. A proofreader proofreads.
- Few other employees are available to take it on. In a three-person office, answering the phone may be essential for everyone.
- It is specialized enough that the person was hired for that particular expertise.

Everything else is marginal — useful to have, not the reason the job exists.

How To Use This



The hiring manager completes it.

You are describing the job as it is actually performed today, not as the original job description described it.



HR reviews it.

A second reader catches requirements that crept in by habit rather than necessity.



Both sign at the end, kept with job record.

A dated worksheet is what lets you reconstruct your reasoning later.

What Counts As Evidence

If a function is ever disputed, what gets examined is the employer's own judgment, any job description written before the role was advertised, how much time the function takes, what happens if nobody performs it, and the experience of people who have held the job. Two of those are captured on the next page, which is why the columns are there.

A note on time spent. No percentage automatically makes a function essential. Something performed two percent of the time can still be essential if the consequences of skipping it are serious enough (ex: a lifeguard rarely performs a rescue). Record the percentage, then check it against consequence.

Position Details

Position title		Job code	
Department		Location	
Reports to		Date completed	
Purpose of the role			

1. Job Functions

List every function the role performs. Mark each one E (essential) or M (marginal), estimate the share of working time it takes, and note whether the result could be achieved a different way.

Describe the result, not the method. “Moves materials between the dock and storage” rather than “carries boxes.” Same requirement, but the first leaves room for a cart — and that’s the difference between a requirement and a barrier.

Function	E/M	% of time	Could the result be achieved another way?

Before moving on, check the essential ones against consequence: If this function went unperformed for a month, what would actually break?

2. Physical, Sensory, and Cognitive Requirements

Record only what the job genuinely requires. An inflated requirement you can't justify isn't protection; instead, it narrows your candidate pool and it is hard to defend if challenged.

Frequency key:
N = not required · R = rarely (0–15%) · O = occasionally (16–45%) · F = frequently (46–100%)

Physical					
Requirement	N	O	R	F	If required, could it be performed another way?
Remains stationary at a workstation	☐	☐	☐	☐	
Moves about the work area	☐	☐	☐	☐	
Positions self to reach, bend, or kneel	☐	☐	☐	☐	
Moves objects weighing up to _____ lbs	☐	☐	☐	☐	
Ascends and descends stairs or ladders	☐	☐	☐	☐	
Operates a vehicle (class: _____)	☐	☐	☐	☐	
Performs repetitive motion (specify: _____)	☐	☐	☐	☐	

Sensory					
Requirement	N	O	R	F	If required, could it be performed another way?
Detects visual detail (screens, documents, gauges)	☐	☐	☐	☐	
Distinguishes color or judges distance	☐	☐	☐	☐	
Exchanges accurate information with others	☐	☐	☐	☐	
Detects auditory signals (alarms, machinery, calls)	☐	☐	☐	☐	

Cognitive and interpersonal

Requirement	N	O	R	F	If required, could it be performed another way?
Sustains concentration for extended periods	☐	☐	☐	☐	
Analyzes information and solves problems	☐	☐	☐	☐	
Prioritizes competing demands	☐	☐	☐	☐	
Decides with incomplete information	☐	☐	☐	☐	
Reads and produces written material	☐	☐	☐	☐	
Directs the work of others	☐	☐	☐	☐	
Interacts with the public, including difficult situations	☐	☐	☐	☐	

3. Equipment and Work Environment

Equipment and technology

Requirement	N	O	R	F	If required, could it be performed another way?
Computer and standard business software	☐	☐	☐	☐	
Specialized software (specify: _____)	☐	☐	☐	☐	
Phone, headset, or video conferencing	☐	☐	☐	☐	
Mobile or handheld device	☐	☐	☐	☐	
Hand tools	☐	☐	☐	☐	
Power tools or machinery	☐	☐	☐	☐	
Powered vehicle or lift equipment	☐	☐	☐	☐	
Personal protective equipment	☐	☐	☐	☐	

Work environment

Requirement	N	O	R	F	If required, could it be performed another way?
Indoors, climate controlled	☐	☐	☐	☐	
Outdoors, exposed to weather	☐	☐	☐	☐	
Temperature extremes (specify: _____)	☐	☐	☐	☐	
Elevated noise levels	☐	☐	☐	☐	
Fumes, dust, or airborne particles	☐	☐	☐	☐	
Confined spaces or working at height	☐	☐	☐	☐	
Remote or hybrid, home workstation	☐	☐	☐	☐	
On-call, rotating, or night shifts	☐	☐	☐	☐	
Travel (approximate share: _____ %)	☐	☐	☐	☐	

4. Review and Sign-Off

The reviewer is checking one thing above all: Is every essential function here genuinely essential, and is every requirement genuinely required?

	Name	Signature	Date
Completed by (manager)			
Reviewed by (HR)			

Review notes	
--------------	--

This worksheet is general guidance, not legal advice. Requirements vary by jurisdiction. Have your own counsel review how you apply it.