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PHYSICAL DEMANDS & ESSENTIAL JOB FUNCTIONS

Critical elements in a Job Description for Decisions Pertaining to Hiring, Return to Work, Job Transfers, & Termination

Background

In today's litigious society, employers are implementing more effective policies, procedures, and practices to mitigate risk of lawsuits alleging employment discrimination. Recent amendments to the **Americans with Disabilities Act (ADA)** and the **Family Medical Leave Act (FMLA)** long with the **Lilly Ledbetter law** have spurred employers to develop written job descriptions that accurately reflect the duties, skills, and job requirements for all positions. The ADA does not require written job descriptions, however all employers with 15 or more employees are required to have a listing of job duties, skills, and job requirements for each position.

Employers have found that developing written job descriptions has been much easier with online resources such as **Career Onestop** from the **U.S. Department of Labor**. This site has a [Job Description Writer](#) tool that provides a step by step guide to building a comprehensive job description, retrieve and customize **O*NET** occupational data to include in the written job description, and to edit the job description to the unique needs of the company.

<http://www.careeronestop.org/businesscenter/recruitandhire/identifyyourhiringneeds/create-a-job-description.aspx?ES=Y&EST=job+descriptions>

While online tools such as the Job Description Writer are very helpful, they have some critical deficiencies. Two key elements that should be included in every job description or "listing of duties" are well defined **physical demand requirements** and **essential job functions**. The most effective method for quantifying the physical demands and essential functions is to have a qualified professional perform an on-site job analysis for all jobs of interest. Whatever method you choose, job descriptions or "listings" should be reviewed and updated annually.

Physical Demand Requirements

A valid job analysis or job description listing the physical requirements and essential functions for a job of interest in sufficient detail is essential for all relevant parties as cited in the **Louisiana Workers' Compensation Medical Treatment Guidelines**:

PRINCIPLE #11. Return To Work.

*“Return to work is therapeutic, assuming the work is not likely to aggravate the basic problem or increase long-term pain. The practitioner must provide specific written physical limitations. If a practitioner releases a patient at a level of function lower than their previous job position, the practitioner must provide physical limitations and abilities and job modifications. A patient should never be released to simply “sedentary” or “light duty.” The following physical limitations should be considered and modified as recommended: lifting, pushing, pulling, crouching, walking, using stairs, climbing ladders, bending at the waist, awkward and/or sustained postures, tolerance for sitting or standing, hot and cold environments, data entry and other repetitive motion tasks, sustained grip, tool usage and vibration factors. Even if there is residual chronic pain, return-to-work is not necessarily contraindicated. **The practitioner should understand all of the physical demands of the patient’s job position before returning the patient to full duty and should request clarification of the patient’s job duties. Clarification should be obtained from the employer or, if necessary, including, but not limited to, an occupational medicine physician, occupational health nurse, physical therapist, occupational therapist, vocational rehabilitation specialist, or an industrial hygienist.**”*

*Early return-to-work should be a prime goal in treating occupational injuries given the poor return-to-work prognosis for an injured worker who has been out of work for more than six months. It is imperative that the patient be educated regarding the benefits of return-to-work, work restrictions, and follow-up if problems arise. **When attempting to return a patient to work after a specific injury, clear objective restrictions of activity level should be made. An accurate job description with detailed physical duty restrictions is often necessary to assist the physician in making return-to-work recommendations. This may require a jobsite evaluation.**”*

The recommended level of detail needed in job descriptions is noted in Appendix B of the **Revised Handbook for Analyzing Jobs** (RHAI) published by the U.S. Department of Labor as follows:

“Job descriptions vary in detail from brief, generally worded task statements to element-by-element task descriptions that approach but fall short of the specificity of a motion study. Insufficient detail leaves the user with broad statements too vague to be useful. Excessive detail forces the user to sift through superfluous facts for pertinent data. Not everything in an analyst’s notes needs to go into the job description. By eliminating, summarizing, or selectively highlighting data, the job description can be more usable.

*“Lifting, pushing, pulling are expressed in terms of both intensity and duration. Judgements regarding intensity involve consideration of the weight handled, **position of the worker’s body or the part of the worker’s body used in handling weights**, and the aid given by helpers or by*

mechanical equipment. Duration is the total time spent by the worker carrying out these activities. Carrying most often is expressed in terms of duration, weight carried, and distance carried.

Care must be exercised in evaluating jobs in the strength categories, particularly in interpreting the force and the physical effort a person must exert. For instance, a worker in an awkward crouching position may experience as much difficulty exerting five pounds of force as when exerting thirty pounds at waist height while standing. Also, if one is required continuously to lift, push, and pull objects weighing 15 pounds or to carry these objects long distances, a worker may exert as much physical effort as would be exerted in occasionally or even frequently lifting, pushing, and pulling objects twice as heavy, or in occasionally carrying these objects over short distances.”

Therefore, it is clear that job descriptions should provide sufficient information relative to the physical demands of jobs so that practitioners can make the best informed decisions regarding safe and appropriate job placement.

An overall physical demand level (PDL) rating for the job should be assigned (**Sedentary, Light, Medium, Heavy, or Very Heavy**) based on the following definitions provided by the Dictionary of Occupational Titles and other peer-reviewed published sources as noted in Tables 1-1, 1-2, and 1-3 of Appendix A.

The Dictionary of Occupational Titles (DOT) is a 1991 U.S. Department of Labor publication which contains the job description and other characteristics of **12,761 unique occupations**. The DOT is the single, most comprehensive source of information about occupations in the world. However, the DOT is **occupation specific as opposed to job specific**. Therefore, a **valid job analysis** for a specific job **will always supersede** the generalized physical demand requirements listed in the DOT.

When listing the requirements for lifting, carrying, pushing, and pulling, a description of the weights of objects, force demands, distances, and number of repetitions required per hour and/or per day should be documented. For example in defining a lifting requirement: cases of food product in a cardboard box weighing 50 pounds, are lifted from a pallet 4 inches above floor level and placed onto a 32 inch high storage shelf, 20 times per day.

The physical demands section of a job description or listing are much easier to read when documented in a table format as presented in Table 1-4 of Appendix B.

Essential Job Functions

Essential job functions are the basic job duties than an employee must be able to perform, with or without reasonable accommodation. In contrast, marginal job functions are considered extra or incidental duties. The EEOC recommends that employers carefully examine each job to determine which functions or tasks are essential to performance. This is particularly important before taking an employment action such as hiring, return to work, job transfer, or termination.

Key factors to consider in determining if a function is essential include:

- Does the position exist to perform the function?
- What are the consequences of not performing the function?
- How much time is spent performing the function?
- Are special skills or training required to perform the function?

Functional Testing

Now that you have a firm foundation in your job descriptions or “listing” of requirements, content valid post-offer and fitness-for-duty functional employment tests and more comprehensive functional capacity evaluations can be developed to assist you with making appropriate decisions regarding hiring, return to work, job transfers, and termination issues.

APPENDIX A

TABLE 1-1. Physical Demands of Work & % of Occupations per Work Level (Full & Unrestricted)	
Sedentary 1.5-2.1 METS 11% of Occupations	Exerting up to 10 pounds of force occasionally or a negligible amount of force frequently to lift, carry, push, pull, or otherwise move objects, including the human body. Sedentary work involves sitting most of the time, but may involve walking or standing for brief periods of time. Jobs are Sedentary if walking and standing are required only occasionally and all other Sedentary criteria are met. SSR 83-10 further defines Sedentary work as requiring about 6 hours of sitting and no more than 2 hours of standing or walking in an 8-hour workday. No significant stooping is usually required.
Light 2.2-3.5 METS 49.6% of Occupations	Exerting up to 20 pounds of force occasionally, or up to 10 pounds of force frequently, or a negligible amount of force constantly to move objects. A job should be rated Light work when it requires: (1). Walking or standing to a significant degree; or (2). Sitting most of the time but entails pushing or pulling of arm or leg controls; or (3). Working at a production rate pace entailing constant pushing or pulling of materials even though the weight of those materials is negligible. SSR 83-10 further defines the full range of Light work as requiring 6 or more hours of intermittent standing or walking in an 8-hour workday. Sitting may be required only intermittently and occasionally. Stooping is usually required occasionally.
Medium 3.6-6.3 METS 29.6% of Occupations	Exerting 21 to 50 pounds of force occasionally, or 11 to 25 pounds of force frequently, or greater than negligible up to 10 pounds of force constantly to move objects. SSR 83-10 further defines the full range of Medium work as requiring about 6 or more hours of intermittent standing or walking in an 8-hour workday. Sitting may be required only intermittently and occasionally. Stooping is usually required frequently.
Heavy 6.4-7.5 METS 9.1% of Occupations	Exerting 51 to 100 pounds of force occasionally, or 26 to 50 pounds of force frequently, or 11 to 20 pounds of force constantly to move objects.
Very Heavy > 7.5 METS 0.7% of Occupations	Exerting in excess of 100 pounds of force occasionally, or in excess of 50 pounds of force frequently, or in excess of 20 pounds of force constantly to move objects.

TABLE 1-2. Duration & Repetition Standards	
Not Present	Activity or condition does not exist.
Occasional	Activity or condition exists up to 1/3 of the time equivalent to 2½ hours of an 8 hour work day or up to 20 minutes each hour. 1-100 repetitions per day equivalent to 1-12 repetitions per hour.
Frequent	Activity or condition exists more than 1/3 and up to 2/3 of the time equivalent to more than 2½ hours up to 5¼ hours of an 8 hour work day or more than 20 minutes and up to 40 minutes each hour. 101-500 repetitions per day equivalent to 13-62 repetitions per hour.
Constant	Activity or condition exists up more than 2/3 of the time equivalent to more than 5¼ hours per work day or more than 40 minutes each hour. More than 500 repetitions per day equivalent to more than 63 repetitions per hour.

APPENDIX A

TABLE 1-3.

**Operational Definitions for Physical Demands and
% of All Occupations per Frequency of Physical Demands (Full & Unrestricted)**

Physical Demand	Definition	N	O	F	C
Sitting	Remaining in a seated position.	89%			11%
Standing	Remaining on one's feet in an upright position at a workstation without moving about.	11%			89%
Walking	Moving about on foot.	11%			89%
Lifting	Raising or lowering an object from one level to another (includes upward pulling).		100%		89%
Carrying	Transporting an object, usually holding it in the hands or arms or on the shoulder.		100%		89%
Pushing	Exerting force upon an object so that the object moves away from the force (includes slapping, striking, kicking, and treadle actions).		100%		89%
Pulling	Exerting force upon an object so that the object moves toward the force (includes jerking).		100%		89%
Grasping	Seizing, holding, grasping, turning, or otherwise working with hand or hands. Fingers are involved only to the extent that they are an extension of the hand, such as to turn a switch or shift automobile gears.	1%	7%	81%	11%
Fingering	Picking, pinching, or otherwise working primarily with fingers rather than with the whole hand or arm as in handling.	16%	29%	50%	5%
Reaching	Extending hand(s) and arm(s) in any direction.	1%	7%	81%	11%
Stooping	Bending body downward and forward by bending spine at the waist, requiring full use of the lower extremities and back muscles.	65%	24%	11%	<1%
Squatting	Bending body downward and forward by bending legs and spine.	78%	16%	6%	<1%
Kneeling	Bending legs at knees to come to rest on knee or knees.	85%	11%	4%	<1%
Climbing	Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like, using feet and legs or hands and arms. Body agility is emphasized.	87%	10%	3%	<1%
Balancing	Maintaining body equilibrium to prevent falling when walking, standing, crouching, or running on narrow, slippery, or erratically moving surfaces; or maintaining body equilibrium when performing gymnastic feats.	1%	7%	81%	11%
Crawling	Moving about on hands and knees or hands and feet.	97%	3%	<1%	<1%
Feeling	Perceiving attributes of objects, such as size, shape, temperature, or texture, by touching with skin, particularly that of fingertips.	84%	10%	5%	1%
Talking	Expressing or exchanging ideas by means of the spoken word to impart oral information to clients or to the public and to convey detailed spoken instructions to other workers accurately, loudly, or quickly.	64%	10%	26%	<1%
Hearing	Perceiving the nature of sounds by ear.	60%	13%	26%	<1%
Tasting/Smelling	Distinguishing with a degree of accuracy, differences or similarities in intensity or quality of flavors or odors, or recognizing particular flavors or odors, using tongue or nose.	99%	<1%	<1%	0%
Near Acuity	Clarity of vision at 20 inches or less.	14%	14%	67%	5%
Far Acuity	Clarity of vision at 20 feet or more.	88%	5%	6%	<1%
Depth Perception	Three dimensional vision. Ability to judge distances and spatial relationships so as to see objects where and as they actually are.	53%	15%	31%	1%
Accommodation	Adjustment of lens of eye to bring an object into sharp focus. This factor is required when doing near point at varying distances from the eye.	62%	20%	17%	1%
Color Vision	Ability to identify and distinguish colors.	62%	27%	10%	<1%
Field of Vision	Observing an area that can be seen up and down or to right or left while eyes are fixed on a given point.	93%	3%	4%	<1%

APPENDIX B

TABLE 1-4. Physical Demands Job Analysis		
Job: Food Service Worker	PDL Rating: Medium	DOT Code: 313.361-014
Physical Demand	Requirement	Materials/Equipment
Sitting	Occasional.	N/a.
Standing	Frequent.	N/a.
Walking	Frequent inside on level ground. Never outside on unlevel ground.	N/a.
Lifting Floor to 32 inches	50 pounds occasionally, up to 20 reps per day.	Cases of food products.
Lifting 32 to 60 inches	40 pounds occasionally, up to 20 reps per day. 25 pounds frequently, up to 110 reps per day.	Cases of food products. Prepared food products.
Lifting Above 60 inches	30 pounds occasionally.	Cases of food products.
Carrying	50 pounds occasionally, up to 20 reps per day. 25 pounds frequently, up to 110 reps per day. Carry distance: 20 feet each repetition.	Cases of food products. Prepared food products.
Pushing- Pulling	40 pounds of force occasionally, up to 20 reps per day. 20 pounds of force frequently, up to 110 reps per day. Push-pull distance: 20 feet each repetition.	Rolling cart loaded with cases of food products and prepared food products.
Grasping	Constant.	Food products, cooking utensils.
Fingering	Occasional.	Cooking utensils.
Reaching	Forward: Constant. Overhead: Occasional.	N/a.
Stooping	Frequent.	N/a.
Squatting	Occasional, up to 20 reps per day.	N/a.
Kneeling	Occasional, up to 10 reps per day.	N/a.
Climbing	Occasional, up to 5 reps per day.	Step ladder. Two steps.