

Guidance for completing the job analysis questionnaire

The [job analysis questionnaire](#) is designed to obtain all the information necessary to evaluate your job locally. It may seem long and sometimes repetitive, but it is very important that you take the time to complete it fully and provide relevant and clear examples about your job. If the evaluation panel does not have all the information it needs, it will not be able to evaluate your job properly.

It is helpful to read each question in the JAQ and then read the guidance relating to it before answering the question.

Contents

Main tasks table	Page 2
Factor 1 - Communication and relationships section	Page 3 – 4
Factor 2 - Knowledge, training and experience	Page 5 – 7
Factor 3 - Analytical and judgement skills	Page 8
Factor 4 - Planning and organisational skills	Page 9 - 10
Factor 5 – Physical skills	Page 11 - 12
Factor 6 – Responsibility for patient/client care	Page 13 - 15
Factor 7 – Policy and service development	Page 16 - 17
Factor 8 – Financial and physical resources	Page 18 - 20
Factor 9 – Human resources	Page 21 - 23
Factor 10 – Information resources	Page 24 - 25
Factor 11 – Research and development (R&D)	Page 26 - 27
Factor 12 – Freedom to act	Page 28 - 30
Factor 13 – Physical effort	Page 31 - 32
Factor 14 – Mental effort	Page 33
Factor 15 – Emotional effort	Page 34
Factor 16 – Working conditions	Page 35 - 36
Appendix 1 – Additional guidance for factor 2	Page 37

Main tasks

Section	Action	Guidance
Main tasks table	<p>List the main tasks within your job and indicate any tasks, which are only carried out occasionally.</p> <p>Provide enough detail to enable readers to understand what you do.</p> <p>Please also indicate the approximate proportion of your time spent on each task. This may be over a typical week if your job has a weekly work cycle or over a month or year for jobs, which vary seasonally.</p>	<p>It is helpful to begin the description of each main task with a verb (e.g. assesses, cleans, transports). You should provide sufficient detail to give readers who may know nothing about your job a general picture of what it involves.</p>

Factor 1 - Communication and relationship skills

This factor measures the skills required to communicate, establish and maintain relationships and gain the co-operation of others. It takes account of the skills required to motivate, negotiate, persuade, make presentations, empathise, communicate unpleasant news sensitively and provide counselling and reassurance.

Please answer the following questions and provide examples for communication that has occurred in the last 12 months. State whether the communication is with other employees, patients/clients or their carers, or with the general public/external organisations.

General point:

Try to use different examples for each skill used, but where this is not possible you can refer back to the first use of the example, you do not need to write it out again (e.g. example as for 'persuade or influence').

1.1.1 Describe / explain	Give examples of the type of communication (oral, written, electronic non-verbal etc.), with whom and why. e.g.1: I talk to my supervisor about my work every morning. e.g.2: I explain to patients my diagnosis of their symptoms and the treatment.
1.1.2 Persuade or influence	Give examples of when you have persuaded or encouraged people to follow a specific course of action.
1.1.3 Negotiate	Give examples of when you have had to negotiate with people to reach a compromise or agreement. For example, negotiating delivery times/ prices with suppliers to ensure stocks are maintained at required levels.
1.1.4 Motivation	Give examples of when and why you have had to motivate or encourage others to do something.
1.1.5 Use tact / diplomacy?	Give examples of when you have had to ensure that your communication will not cause hostility, opposition or offence and will keep open the channels of communication.
1.1.6 Use empathy?	Give examples when you have had to show an appreciation of, or put yourself in a position to understand another person's situation or point of view.
1.1.7 Counsel?	Give examples of when you have used formal counselling skills in one-to-one and/ or group counselling sessions. Say whether the job requires counselling skills that have been gained through training or experience.
1.1.8 Re-assure?	Give examples of when you have needed to reassure others, for example to restore their confidence or confirm their opinion.

1.1.9 Give advice, instruction and training?	Give examples of where you have provided practical training or advice to people on a particular subject, for example, manual handling, new equipment familiarisation, hygiene, health & safety, working practices.
1.1.10 Communicate to groups / give presentations?	Give examples of the groups you have communicated with e.g. educational groups, Board meetings, workshops etc., including their size. Describe any communication aids (e.g. power point, overhead slides) or voice projection techniques you used.
1.1.11 Communicate in a language other than English?	Give examples of when and how often you need to communicate in a language other than English, for example Welsh, Hindi, sign language etc. and explain why this is necessary. Include whether this is a requirement of the job.
1.1.12 Overcome barriers to understanding?	Give examples of situations where the audience could not easily understand because of cultural or language differences, physical or mental special needs, age (e.g. young children or elderly patients/ clients) or because of resistance to understanding.
1.1.13 Communicate complicated information?	Give examples of information that you have communicated that is made up of a number of different parts, each of which was very involved, who to and why. Also say if the information was conflicting or inconsistent and if so please explain.
1.1.14 Communicate sensitive information?	Give examples of where you have communicated financial, personal, public relations or organisational information of a delicate or personal nature where there may be issues of how and what is conveyed. Explain why the information is sensitive.
1.1.15 Communicate in an emotive atmosphere?	Give examples of situations when you have had to communicate and deliver your message in a highly charged atmosphere. Explain how you have communicated the information and the skills that you have used to ensure understanding and acceptance.
1.1.16 Communicate information which may be contentious	Give examples of where you have had to communicate information that could or did cause controversy and is likely to be challenged, for example, a major organisational change or closure of a hospital unit.
1.1.17 Communicate in a hostile /antagonistic atmosphere?	Give examples of communicating where there has been a degree of hostility and/ or antagonism (opposition) towards the message. Explain what gave rise to this and the communication skills that you used to ensure understanding and acceptance.

Factor 2 - Knowledge, training and experience

Describe the knowledge of work procedures/practices (i.e. methods of doing things) and the administrative, clinical, therapeutic, social care, scientific, technical, managerial and professional knowledge which you need for your job in the table below. Please look first at the box on the left and then work across, stating whether you need any knowledge in this area, describing the range of procedures, how the knowledge is usually obtained and the qualifications/knowledge that you actually require to enable you to do your job. Further guidance is available in [Appendix 1](#) at the end of the document

Note: Where courses are part-time, please state the full time equivalent or quote the amount of time per week/year required for course completion.

General point:

Describe the main types of knowledge required for your job under the most appropriate question heading starting with the one that is the most central to your job. Current qualification requirements should be listed once in the most relevant section.

2.1.1 Administrative knowledge	<p>Q1. Give examples of the administrative procedures you use. e.g.1 Knowledge of admission procedures is for my work on the reception desk e.g.2 I have to know how the invoicing procedures work as I have to answer queries relating to them.</p> <p>Q2. Describe how this knowledge can be gained. e.g.1 Minimum experience of one month on the job to fully understand them e.g.2 At least one year's experience working in invoicing plus an understanding of the complete invoicing process.</p> <p>Q3. Describe current qualification requirements for this type of knowledge e.g.1 GCSEs – 5 years e.g.2 NVQ 3 or equivalent qualification 2 year's part time study.</p>
2.1.2 Clinical / therapeutic / social care knowledge	<p>Q1. Give examples of clinical, therapeutic or social care knowledge that you need to have to do your job. e.g. Knowledge of the full range of midwifery duties needed to care for mothers and their babies in the community.</p> <p>Q2. Describe how this knowledge can be gained. e.g. At least 2 years' experience of professional midwifery duties and at least one year's experience of working in the community.</p> <p>Q3. e.g. a degree in midwifery which takes 3 years.</p>

2.1.3 Technical knowledge (including knowledge of equipment)	<p>Q1. Give examples of chemical, mechanical or electrical engineering or building, computing or equipment knowledge that you need to have to do your job. e.g. Knowledge of how to repair and maintain the mechanical equipment covered by the Estates department.</p> <p>Q2. Describe how this knowledge can be gained. e.g. On the job experience and instruction – 4 years.</p> <p>Q3. Describe current qualification requirements for this type of knowledge e.g. Apprenticeship training or equivalent level of knowledge.</p>
2.1.4 Scientific knowledge	<p>Q1. Give examples of biological, chemical, physical or similar knowledge that you need to have to do your job. e.g. Knowledge for processing and analysing biological specimens and entering them onto the computer.</p> <p>Q2. Describe how this knowledge can be gained e.g. Practical knowledge on processing the specimens and recording the results could be gained in a few weeks.</p> <p>Describe current qualification requirements for this knowledge e.g. Degree in a biomedical science - 3 years.</p>
2.1.5 Managerial knowledge	<p>Q1. Give examples of knowledge of supervisory and management theory and techniques that you need to have to do your job. e.g. I need to know how to appraise, delegate, motivate, train, develop staff and carry out a range of HR procedures.</p> <p>Q2. Describe how this knowledge can be gained. e.g. On the job experience plus short courses and personal study.</p> <p>Q3. Describe current qualification requirements for this knowledge. e.g. No formal qualification required.</p>

2.1.6 Additional specialist knowledge	<p>Q1. Describe any additional specialist knowledge that you need to have to do your job. This may be an additional specialism. e.g. a clinician may have specialist knowledge of, for example, diabetes as well as his /her main area of clinical knowledge.</p> <p>Q2. Describe how this knowledge can be gained. e.g. Personal study and research together with on-the-job experience.</p> <p>Q3. Describe current qualification requirements for this knowledge. e.g. Training in the treatment of sports injuries to diploma level - 1 year FTE.</p>
2.1.7 Knowledge of legislation, codes of practice	<p>Q1. Give examples of laws, statutes, legally binding procedures or codes of practice that you need to know about to do your job. Say how detailed your knowledge has to be and why. e.g. Knowledge of law covering recruitment, discipline, sickness absence.</p> <p>Q2. Describe how this knowledge can be gained. e.g. Practical experience and personal study for a minimum of 1 year plus theoretical knowledge.</p> <p>Q3. Describe current qualification requirements for this knowledge. e.g. degree (3 years) plus part membership of CIPD.</p>
2.1.8 Other types of knowledge not already covered but required for the job	<p>Q1. Give examples of other types of knowledge that you need to have to do your job.</p> <p>Q2. Describe how this knowledge can be gained.</p> <p>Q3. Describe current qualification requirements for this knowledge.</p>
2.2 Please list below the qualifications or experience actually required for your post.	<p>State minimum knowledge required by a competent performer to do the job to the required standards.</p> <p>Where the minimum knowledge requirements for the job have increased over time, the current job requirement should be entered. Consult your manager on this.</p>

[Back to contents page](#)

Factor 3 – Analytical and judgement skills

This factor measures the analytical and judgemental skills required to fulfil the responsibilities of the job satisfactorily, for example, analytical skills to diagnose a problem or illness and understand complex situations or information; judgemental skills to formulate solutions and recommend/decide on the best course of action/treatment.

Complete the appropriate boxes about the nature of the judgements you have to make regularly in the course of your work.

General point:

Give typical examples of judgments that cover the range of work that you do, including the type of options considered and the solution to each. You may need to look back over a number of weeks or months for examples for this section.

3.1.1 Make judgements where the situation is straightforward?	Give examples of judgements where the facts/ situations have been easy to understand. Describe the judgments and the number of options considered. e.g.1 I decide which cleaning material is the most suitable from 2 possible alternatives I could use.
3.1.2 Make judgements where the situation is not straightforward?	Describe why the facts/ situations were not straightforward and whether you had to analyse information, situations, objects or problems e.g. fault finding on complex equipment, patient assessments, financial queries and disciplinary cases.
3.1.3 Make judgements where there is a range of options to select from?	Give examples of judgements you have had to make where there were ranges of possible options to consider and compare. Describe the type of options.
3.1.4 Assess or interpret information in order to make a judgement?	Give examples of judgements you have had to make where you have had to weigh up or make sense of complicated facts, situations or illnesses because the information was unclear, conflicting or incomplete.
3.1.5 Make judgements where expert opinion may differ or be conflicting?	Describe judgements you have made where expert opinions on the subject were different and possibly conflicting. This could be in a specialist area where situations may have unique and complicated aspects, which do not have obvious solutions.

[Back to contents page](#)

Factor 4 – Planning and organisational skills

This factor measures the planning and organisational skills required to fulfil the responsibilities of the job satisfactorily, for example, for clinical or non-clinical planning, including strategic planning and organising services, departments, rotas, meetings and conferences.

Does your job require you to plan or organise any of the following? If so, complete the relevant boxes below.

Note: Time in advance of the event means the period that the plan is to cover, starting with the day it is prepared.

General point:

Again, work through the Yes/No boxes first and then provide examples for all those answered 'Yes'. Only include planning and organisational activities you carry out yourself.

4.1.1 Own time?	Give examples of what you have to plan or organise on a day-to-day basis in relation to your own work e.g. 1 - I plan my travel arrangements to ensure that I get to my meetings on time. e.g. 2 - I plan the order of my daily and weekly cleaning duties and how far ahead do you plan? e.g. 1 - 3 days. e.g. 2 - 1 week.
4.1.2 Time of others?	Give examples of planning or organising that you carry out e.g. clinics/ parent craft classes; patient/ client care; ensuring that accounts are prepared to deadlines. Include whether you need to make changes to the plans/ arrangements and how far ahead do you plan?
4.1.3 Rotas?	Describe the rotas you have to prepare, how far ahead the rotas are prepared for and whether you need to make changes to them. Include how you organise the rotas and how many staff they cover and how far ahead do you plan?
4.1.4 Meeting arrangements	Describe the planning and organising you have to do to arrange meetings. Include the number of people usually attending the meeting (please give a range if this varies) and if they come from different disciplines or organisations, please describe and how far ahead do you plan?

4.1.5 Conference arrangements?	Describe the planning and organising you have to do to arrange conferences, the approximate number of people usually attending (please give a range if this varies) and if you arrange layout or venues or invite or select speakers and how far ahead do you plan?
4.1.6 Co-ordinating other agencies / organisations?	Describe any people, agencies or organisations you co-ordinate and whether you are the main person doing the planning or organising. Say whether you have to make changes to these plans and if so, describe how and how far ahead do you plan?
4.1.7 Project management?	Describe the project planning and organising you do. Include the type of project, whether you are the main person responsible for the planning/ organisation, the number of projects usually on-going, the type of projects and the nature of any changes and how far ahead do you plan?
4.1.8 Service provision	Describe the project planning and organising you do. Include the type of project, whether you are the main person responsible for the planning/ organisation, the number of projects usually on-going, the type of projects and the nature of any changes and how far ahead do you plan?
4.1.9 Educational or training programmes?	Describe the project planning and organising you do. Include the type of project, whether you are the main person responsible for the planning/ organisation, the number of projects usually on-going, the type of projects and the nature of any changes and how far ahead do you plan?
4.1.10 Long term strategic planning?	Describe the project planning and organising you do. Include the type of project, whether you are the main person responsible for the planning/ organisation, the number of projects usually on-going, the type of projects and the nature of any changes that you make and who approves them and how far ahead do you plan?
4.1.11 Other, please specify?	Please describe anything you are required to plan or organise that has not been covered above and how far ahead do you plan?
4.2 Does any of your planning affect departments, staff or management across the organisation or in other organisations?	Give examples of any plans you have to make or events you have to organise that affect people across other departments/ services /organisations.

[Back to contents page](#)

Factor 5 – Physical skills

This factor measures the physical skills required to fulfil the job duties. It takes into account hand eye co-ordination, sensory skills (sight, hearing, touch, smell, taste), dexterity, manipulation, requirements for speed and accuracy, keyboard and driving skills.

Does your job require physical skills? If so, please tick the box(es) next to the appropriate activity and provide an example of how the skill is used.

Note: Developed skills are normally acquired through considerable practice and/or training and include dexterity.

General point:

Work through the skills and descriptions, giving examples of those you are required to use in your job.

5.1.1 Driving a car/ small van	Give examples of when you are required to use these skills in your job (not to and from work).
5.1.2 Driving a lorry / heavy vehicle / patient transport services	Give examples of when you are required to use these skills in your job and whether there is a requirement to have a tested skill such as an HGV, PSV or PCV license.
5.1.3 Driving vehicles in emergency situations	Give examples of when you are required to use these skills in your job and whether there is a requirement to have a high-speed driving test.
5.1.4 Standard keyboard use	Give examples of when you are required to use these skills in your job.
5.1.5 Advanced keyboard use	Give examples of when you are required to use these skills, whether there is a requirement to type quickly and accurately, whether you are required to have a tested skill level for the job and if so, include what your typing speed is required to be.
5.1.6 Use of equipment/tools	Describe skills which can be learned through instruction on the job and practice that you are required to have to use equipment or tools. Indicate what equipment or tools you use.
5.1.7 Non-intravenous injections	Describe skills which can be learned through instruction on the job and practice that you are required to have to use equipment or tools. Indicate what equipment or tools you use.
5.1.8 Restraint of patients / clients	Describe when you are required to use restraint skills and whether you are required to have formal training and updating.

5.1.9 Manipulation of objects / tools where narrow margins for error	Give examples of when you are required to use these skills in your job. Describe the objects or tools you are required to move or manipulate and why there is a narrow margin for error.
5.1.10 Hand signing	Give examples of the type of hand-signing skill you are required to use, when you are required to use it and what training is required to learn it.
5.1.11 Advanced sensory skills	Give examples of when you are required to use advanced sensory skills such as listening, smell, touch, sight in your job.
5.1.12 Manipulation of fine tools; where accuracy important	Describe the tools which you are required to use, what you produce and why accuracy is important.
5.1.13 Manipulation of materials where accuracy important	Describe how and why you are required to manipulate materials and why accuracy is important.
5.1.14 Assembly of surgical equipment; accuracy important	Describe the surgical equipment you are required to assemble/ dismantle, how many individual operations (movements) are required to do this and why accuracy is important.
5.1.15 Intravenous injections	Give examples of why and when you are required to use this skill in your job.
5.1.16 Manoeuvring people where accuracy important	Give examples of why and when you have to manoeuvre people and say why accuracy is important.
5.1.17 Suturing	Give examples of why and when you are required to use this skill in your job. Say whether precision or hand, eye, sensory co-ordination is required and why.
5.1.18 Manual physiotherapy treatment	Give examples of when you are required to use this skill in your job.
5.1.19 Surgical interventions	Describe the surgical interventions you undertake.
5.1.20 Keyhole, laser surgery, IVF procedures	Describe the surgical interventions you undertake.
5.1.21 Other physical skill	Give examples of when you are required to use these skills in your job.

Factor 6 – Responsibility for patient/client care

This factor measures the responsibilities of the job for patient/client care, treatment and therapy, taking into account the nature of the responsibility and the level of the jobholder's involvement in the provision of care or treatment to patients/clients. It also takes account of the responsibility to record care/treatment/advice/tests.

General point:

Read through the whole section, completing the Yes/No boxes first. Then go back and fill in the description(s) for the Yes box(es), starting with the one that fits your job best.

6.2.1 Providing general non-clinical advice or information directly to patients/clients?	Includes administrative procedures, out-patient clinics, visiting arrangements or externally provided services, such as housing benefits, maternity provision, social services. e.g.1 I tell patients at the reception desk about suitable appointments.
6.2.2 Providing a cleaning or food delivery service directly to, or in the immediate vicinity of patients/clients?	Includes delivering or serving food to patients or cleaning around patients on the ward.
6.2.3 Providing personal care (assisting with feeding, bathing, appearance), or portering services directly to patients/clients?	Includes hairdressing, manicure and make-up services, personal clothing and laundry. Portering includes transporting patients around the hospital or collecting/ delivering them from/to their homes.
6.2.4 Implementing clinical care/treatment/therapy programmes/packages?	Includes putting into practice a plan or package, which has been determined by others. This may entail making minor modifications to it and reporting back on progress or supervising individual or group therapy sessions within an overall programme.
6.2.5 Assessing clinical care needs and developing clinical care / treatment /	Includes diagnosing and treating/ providing therapy to patients/clients.

therapy programmes / package?	
6.2.6 If 'Yes', are these in a specialist field or do they cover a broad range of situations?	This means responsibility at a higher level or in a more specific area of practice than for generalist practitioners.
6.3.1 Direct involvement in the provision of basic clinical/therapeutic advice to patients / clients?	Includes the provision of straightforward clinical advice by people who are not clinical specialists, for example emergency call service operators.
6.3.2 Involvement in the registration, inspection or quality assurance of facilities/services for patients/clients?	Includes visiting premises which are to be used by/for patients/ clients, either in the community or in a hospital setting e.g. nursing homes.
6.3.3 Direct involvement in the provision of clinical/therapeutic advice to patients / clients?	Includes advice which contributes to the care, wellbeing or education of patients/clients, including health promotion.
6.3.4 If 'Yes', are these in a specialised area of practice?	Includes advice in a specialised area, for example pharmaceutical or dietetic advice on individual patient care.
6.3.5 If 'Yes', are these in an expert area of practice?	Includes providing advice in an expert area, for example clinicians working in a specialist field, such as groups with specific health and social needs.
6.4.1 Direct involvement in the provision of basic clinical technical services to patients/clients?	Includes cleaning, sterilising or packing specialist equipment/facilities used in the provision of clinical services e.g. sterile supplies; theatres; laboratories; obtaining, processing or screening diagnostic test samples or dispensing medicines.

6.4.2 Direct involvement in the provision of clinical technical services to patients/clients?	Includes initial screening of diagnostic test samples, dispensing medicines, undertaking standard diagnostic (e.g. radiography, neurophysiology) tests for patients or maintaining or calibrating specialist or complex equipment for use on patients.
6.4.3 If 'Yes', do you provide clinical technical services which are of a specialist nature?	Includes interpreting diagnostic test results, carrying out complex diagnostic procedures, processing and interpreting mammograms, constructing specialist appliances, calibrating or maintaining highly specialist or highly complex equipment.
6.4.4 If 'Yes', are these of a highly specialist nature in an expert area of practice?	Includes providing a highly specialised service, for example, the maxillo-facial prosthodontics service.
6.5.1 Direct delivery of a clinical, clinical technical, therapeutic or social care service?	Includes directly managing the providers of direct patient/client care, in a clinical service (e.g. paediatrics), a clinical technical service (e.g. medical physics) or social care service (e.g. learning disabilities). Please describe the service.
6.5.2 If 'Yes', do you have corporate responsibility for this?	If you have Trust Board level responsibility for provision of a service, please describe.
If you have said 'YES' to any of the points in 6.2 to 6.5 above please describe your involvement below, starting with the one that is the most applicable to your job.	Give examples of what you are required to do in the area of work mentioned in the relevant question.

Factor 7 – Policy and service development

This factor measures the responsibilities of the job for development and implementation of policy and/or services, taking into account the nature of the responsibility and the extent and level of the jobholder's contribution to the relevant decision-making process, for instance, making recommendations to decision makers and the scope of the relevant policies or services.

Please select the options on the left which accurately reflect the requirements of your job concerning policies and procedures and complete the boxes in that row.

General point:

'Policy' refers to a documented method for undertaking a task, which is based on best practice, legal requirements or service needs e.g. directorate policy on treatment of leg ulcers or trust policy on reporting accidents.

By department / area covered (fourth column of table) examples are as follows:

e.g.1 Purchase ledger.

e.g.2 Physiotherapy section.

7.1.1 Are you required to comment on policy that is used within your area?	Give examples of policies you have commented on. e.g.1 When a new procedure for entering invoices was introduced, I was asked how I thought it would affect my job. e.g.2 I can comment on new clinical practices in my area in section meetings.
7.1.2 Do you actively implement policy within your section / department / service / directorate or the whole organisation?	Give examples of policies or procedures that you have been involved in implementing and your role in the introduction of these.
7.1.3 Are you required to propose changes to policies or procedures that are used in your section/ department/ service and/ or other areas?	Give examples of work practices, policies or procedures that you have played a role in shaping, or making suggestions to change or adapt. Say where they are used and whether this is inside or outside your section/department/service.

<p>7.1.4 Are you involved with the creation of policy that impacts on a service / directorate / the whole organisation / other organisations?</p>	<p>Give examples of policies where you have been involved in their creation or adaptation and they have directly influenced practices or procedures in your or other department(s), service(s), directorate(s), organisation(s).</p>
<p>7.1.5 Are you involved with service development for a service / directorate / the whole organisation / other organisations?</p>	<p>Give examples of where you have been involved in developing services and they have directly influenced practices in your department, service, directorate, organisation or other departments, services, directorates, organisations.</p>
<p>7.1.6 Do you have corporate responsibility for the creation of policy within your organisation?</p>	<p>This type of responsibility would be held by those on the Board or equivalent level of accountability who hold the highest level of responsibility for the formulation and implementation of policy and service development. Please describe this.</p>

Factor 8 - Financial and physical resources

This factor takes account of the type of responsibility (i.e. what you are responsible for) and the nature of that responsibility (for example, careful use, security, maintenance, budgetary, ordering and purchasing responsibilities) and the frequency with which it is exercised.

General points:

As before, work through the questions first, putting ticks or Yes's or No's in the boxes, as appropriate. Then consider the examples you want to use and allocate them to the Yes box options.

- For the 'delegated authority level or value (£)' column, add the financial limit or value of items.
- For the 'are you a signatory for this responsibility?' column, add yes or no.
- For the 'so you share this responsibility? If yes, with whom?' column, If yes, who else has this responsibility?

8.1.1 Are you responsible for the safe use of equipment used by others?	Give examples of equipment which you are required to ensure is used safely by others. This may be by ensuring that it is correctly maintained and in good working order, or by ensuring that it is used correctly and safely by supervising/ managing it.
8.1.2 Do you use expensive or highly complex equipment?	Give examples of expensive or complex equipment that you are required to use.
8.1.3 Do you have responsibility for security of a site?	Describe this responsibility, including the area covered.
8.1.4 Do you repair, maintain or install physical assets?	Describe your responsibilities in respect of the repair, maintenance or installation of equipment, machinery or the fabric of the building. Include the types of assets you have responsibility for.
8.1.5 Are you responsible for the maintenance of all physical assets for an area?	Describe your responsibilities in respect of the maintenance of equipment, machinery or the fabric of the building. Include the types of assets you have responsibility for and the department/service this responsibility covers.
8.1.6 Are you responsible for the purchase of equipment / materials?	Give examples of the type of equipment and materials that you are required to purchase. Explain your role in terms of the selection of suppliers, gaining value for money and ensuring procurement rules are adhered to.

8.1.7 Do you undertake purchasing as a major part of your role?	Describe your involvement and responsibilities for the procurement of supplies, services and assets and give examples of the types of goods services etc that are procured. Include the proportion of your time that you spend on purchasing.
8.1.8 Are you responsible for the physical assets for several services?	Describe this responsibility, including the nature of the assets and the services covered.
8.1.9 Do you have corporate responsibility for physical assets?	If you have Trust Board level responsibility for the procurement, repair or security of Trust assets, describe the role that you have and the areas/ services/ organisations covered by this responsibility.
8.2.1 Is a significant part of your role the security of stock or supplies?	If one of the main purposes of your role is the security of stock and supplies, describe what you are required to do and the responsibility that you have. Give examples of the type of stock and supplies.
8.2.2 Are you responsible for ordering or controlling stock and supplies used in the course of your work?	Describe the types of stock and supplies that you order or are responsible for. Include whether these supplies are primarily for your own use, or for the use of a department/ function.
8.2.3 Are you responsible for the purchase of stock and supplies?	Give examples of the type of stock and supplies that you are required to purchase. Explain your role in terms of the selection of suppliers, gaining value for money and ensuring procurement rules are adhered to.
8.2.4 Do you undertake purchasing as a major part of your role?	If one of the main purposes of your role is the procurement of supplies, services and assets, describe your involvement and responsibilities and examples of the types of goods services etc that are procured.
8.3.1 Do you handle cash, cheques or patients' valuables?	As part of your normal duties are you responsible for cash, cheques or patients' valuables. Describe what you do and the types of things you are required to handle.
8.3.2 Do you check and verify expense sheets, purchase documents or similar?	Give examples of the types of expenses sheets or purchase documents that you check and verify and any responsibilities you have for the processing and certification of these documents.

8.3.3 Are you an authorised signatory for invoices, overtime etc?	Give examples of the types of payments that you sign for.
8.3.4 Do you monitor financial information?	Describe your role in monitoring or reviewing financial information either as part of budget monitoring or as part of a financial role.
8.3.5 Are you involved in drawing up budgets or financial initiatives?	Describe your role in drawing up, for example, budgets for a department/ service, or income generation or cost improvement programmes.
8.3.6 Is your budget delegated to you by your manager?	If your manager is the budget holder, but you are officially asked to play a role in the budgeting process, describe your role and responsibilities.
8.3.7 Are you a budget holder?	Describe your responsibilities as a budget holder. State the department(s) this is for and your role in monitoring the budget.
8.3.8 Are you involved with the setting of the budget for your department/ service?	Describe your role in determining the value of the budget and the negotiation of the budget for the year. State the department for which you are responsible. This may be a management role or as part of the finance department.
8.3.9 Are you involved with the budget setting of more than one department / service / organisation?	Describe your role in determining the value of the budget and the negotiation of the budget for the year. State the departments, services or organisations you are responsible for. This may be a management role or as part of the finance department.
8.3.10 Do you have responsibility for determining the budget levels for one or more departments/ services or organisations?	As a manager or within the finance department describe your responsibilities for overseeing the budget setting process and the departments, services or organisations this is in respect of.
8.3.11 Do you have corporate responsibility for the financial stewardship of the organisation(s)?	If you have Trust Board level responsibility for the financial stewardship of the Trust, describe this responsibility and the area covered.

Factor 9 - Human resources

This factor measures the responsibilities of the job for management, supervision, co-ordination, teaching, training and development of employees, students/trainees and others in an equivalent position.

General point:

As before, work through the questions first, putting ticks or Yes's or No's in the boxes, as appropriate. Then consider the examples you want to use and allocate them to the 'Yes' box options.

9.1.1 Are you responsible for the day-to-day work allocation, supervision or co-ordination of staff?	Give numbers and describe your responsibilities in respect the management of a department. Include your responsibilities for appraisal, disciplinary, grievance, recruitment/ appointment, performance review and dismissal and your level of involvement with these. e.g. I allocate work to my staff but have no other staff responsibilities.
9.1.2 Are you responsible for the clinical or professional supervision of staff?	Give numbers and describe your responsibilities in respect of clinical/ professional supervision or placement of students/ clinical staff. Include the type of staff supervised.
9.1.3 Do you manage a group of staff within a department / function?	Give numbers and describe your responsibilities in respect of the management of a group of staff. Include your responsibilities for appraisal, discipline, grievance, appointment, performance review and dismissal and your level of involvement with these.
9.1.4 Department/ function?	Give numbers and describe your responsibilities in respect the management of a department. Include your responsibilities for appraisal, disciplinary, grievance, recruitment/ appointment, performance review and dismissal and your level of involvement with these.
9.1.5 Do you manage a number of departments/functions?	Give numbers and describe your responsibilities in respect the management of several departments. Include your responsibilities for appraisal, disciplinary, grievance, appointment, performance review and dismissal and your level of involvement with these.
9.2.1 Do you train new people in the department?	Give numbers and describe your responsibilities and give examples of how often this happens. e.g.1 I explain to new staff how the admissions procedures operate once or twice a year. e.g.2 I show new staff how to file the records correctly about 8 times a year.
9.2.2 Are you required to deliver formal training?	Give numbers and give examples of the type(s) of courses that you have delivered, their duration and the number of times this occurs each year e.g. training other professionals on aspects of own specialism or providing practical training on e.g. lifting and handling.

<p>9.2.3 Are you required to undertake workplace assessments?</p>	<p>Give numbers and describe your responsibilities for undertaking formal workplace assessments. These can be clinical or professional assessments of staff, or workplace assessments such as formal health and safety assessments.</p>
<p>9.2.4 Are you responsible for the placement or allocation of staff or students?</p>	<p>Give numbers and describe your role for placing staff or students into the workplace. Explain how placements are determined and your role in securing the placements before students or staff are allocated.</p>
<p>9.2.5 Is your role concerned with the delivery of core training or teaching as a significant responsibility?</p>	<p>Give numbers and describe your responsibilities for delivering formal training to other staff, agencies or the public. Describe the type of courses that you run, their duration and the number of times this occur each year.</p>
<p>9.2.6 Is your role principally concerned with devising and delivering training programmes?</p>	<p>Give numbers and describe your responsibilities for developing training programmes. Include whether this is a sole responsibility or as part of a team. If as part of a team explain your role within the team.</p>
<p>9.2.7 Are you responsible for the overall management of the teaching or training function?</p>	<p>Describe your role in regard to training and describe the training function that you are responsible for.</p>
<p>9.3.1 Do you offer basic HR advice as part of your role?</p>	<p>Give numbers and describe the type of HR advice that you offer to your staff and the professional HR support that you have to help you do this.</p>
<p>9.3.2 Are you responsible for giving core HR advice to managers?</p>	<p>Give numbers and as part of the HR function give examples of advice that you give to managers, detailing the number of managers and the number of departments concerned. Say how often this occurs.</p>
<p>9.3.3 Do you deliver an HR service across a number of departments or services?</p>	<p>Give numbers and give examples of the HR service(s) (for example recruitment, employee relations) that you provide for managers, detailing the number of managers and the number of departments concerned. Say how often this occurs.</p>

<p>9.3.4 Are you responsible for a significant part of the HR function in your organisation?</p>	<p>Give numbers and describe your HR management role and the HR services you are responsible for delivering.</p>
<p>9.3.5 Do you have corporate responsibility for the HR function?</p>	<p>Give numbers and if you have Trust Board level responsibility for the HR function please describe the scope of this responsibility, including the areas/services covered.</p>

[Back to contents page](#)

Factor 10 - Information resources

This factor measures the responsibilities of the job for all forms of information resources and information systems (for example, computerised, paper based, microfiche). It takes account of whether the information is personally generated or not.

Information production and storage for other people.

General point:

Information system refers to a methodical and structured way of recording, storing or transmitting large amounts of information using manual or computerised methods.

10.1.1 Are you required to make or word process clinical records, letters, reports etc. compiled by others?	If yes, give examples of what records, letters, documents you produce. e.g.1 I word process letters for Section Head. e.g.2 I process clinical records for nursing staff. and How often do you do it? e.g. Daily.
10.1.2 Are you required to complete a timesheet or similar records?	Give an example of what you complete and why (e.g. for own work, for manager etc.) and how often do you do it?
10.1.3 Are you required to process data e.g. test results, statistics etc. compiled by others?	Give an example of what you process or input onto a VDU/ word processor, who for (e.g. for manager, professional staff in department etc.). Include the programme that you use and how often do you do it?
10.1.4 Are you responsible for the storage of data and for its distribution to others?	Give an example of what information (files, accounts, records etc.) you store or distribute, how you store or distribute it and for whom (e.g. personally delivers/ sends electronically, on behalf of manager etc.). AND How often do you do it?
10.1.5 Are you required to take and transcribe formal minutes?	Describe the meetings that you take minutes for, how you take the minutes and what you do with them. AND How often do you do it?
10.2.1 The creation of spreadsheets, including the programming of formulae?	Describe spreadsheets you create, state the programme(s) you use, what it involves, where the data comes from (e.g. is it part of your own work or from elsewhere) and why they are created (e.g. for accounts department, manager, own research etc.) and how often do you do it?

10.2.2 Manipulating data using spreadsheets, databases or other software?	Give an example of what data you work with, what you calculate/ manipulate, what this involves, who it is for and why it is needed (e.g. for accounts department, manager, own work/ research etc.) and how often do you do it?
10.2.3 Creating designs, drawings, layouts using software; other computer aided design (CAD) work?	Give an example of what designs or drawings you create, what software you use and what this involves. Include the design and development of web pages as well as facial re-constructions and other design work and how often do you do it?
10.3.1 Are you responsible for maintaining information systems/ installing software?	If yes, describe what you maintain or install and how you do this (e.g. installs all updates of software used in the department; manages the storage and retrieval of medical records; operates help facilities for an information system) and how often do you do it?
10.3.2 Are you responsible for the adaptation, design or development of information systems?	If yes, describe what systems you modify, design or develop, for whom and what this involves and how often do you do it?
10.3.3 Are you responsible for the operation of information systems as a major job responsibility?	If yes, describe what your responsibilities are, what they involve and the coverage of the information system (e.g. for processing, generating, creating, updating or storing information across departments/ organisations) and what proportion of your time do you spend on this?
10.3.4 Is the main part of your role the management of information systems?	If yes, describe what your responsibilities are and what they involve (e.g. overall responsibility for medical records system for hospital) and what proportion of your time do you spend on this?
10.3.5 Do you have corporate responsibility for system development and management for your organisation or a number of organisations?	If you have Trust Board level responsibility for this service describe the role that you have.

Factor 11 - Research and development (R&D)

This factor measures the responsibilities of the job for informal and formal clinical and/or non-clinical research and development activities underpinned by appropriate methodology and documentation, including formal testing or evaluation of drugs, or clinical or non-clinical equipment.

General point:

First, answer all the questions and then, for all those you have answered 'Yes', describe what you do on the next page.

If you answer 'Yes' to column specify the frequency e.g. 4 times per year.

11.1.1 Carry out surveys?	e.g. Distributes survey forms to groups of people (for example relatives and visitors to the hospital; community groups), analyses results and writes report.
11.1.2 Carry out audits?	e.g. Carries out audits of results of specific treatments in own department.
11.1.3 Participate in R & D, clinical trials or equipment testing led by others?	e.g.1 Uses xyz equipment when treating patients and fills in questionnaire afterwards. e.g.2 Uses new test equipment as directed by lead scientist and records results.
1.1.4 Carry out research / development work which is not part of a formal research programme?	Describe the research and development work you undertake, what you do and who is responsible for it (job title only).
11.1.5 Carry out research / development work which is part of a formal research programme?	Describe the research and development work you undertake, what you do and who is responsible for it (job title only).
11.1.6 Carry out clinical trials?	Describe the research and development work you undertake, what you do and who is responsible for it (job title only).
11.1.7 Carry out your own equipment testing or adaptation?	Describe what equipment trials/ adaptation work you undertake, what you do and who is responsible for it (job title only).

11.1.8 Co-ordinate/implement R&D programmes / activities?	Describe the R&D you are responsible for co-ordinating or implementing, what you do and who is responsible for it (job title only).
11.1.9.i Initiate & develop R&D programmes/activities?	Describe the R&D programmes/ activities you are responsible for initiating or developing, what you do, whether you or someone else is responsible for it and the proportion of your time you spend on this.
11.1.9.ii and do the programmes / activities impact on other trusts or organisations?	If your programmes/ activities have an affect on other organisations, describe how and the areas covered.
11.1.10 Secure funding for R&D programmes/activities?	Describe the R&D programmes/ activities you are responsible for obtaining funding for, what you do and the level of funding obtained.
If you have said YES to any of the points in 11.1.1 to 11.1.10 on the previous page, please describe your involvement below, starting with the one that is the most applicable to your job. For easy reference, write the number you are describing e.g. 11.1.4 in the left-hand column.	Note: If there is a job requirement for you to publish research findings to a wider audience, please describe and say how often you do it.

[Back to contents page](#)

Factor 12 - Freedom to act

This factor measures the extent to which the jobholder is required to be accountable for own actions and those of others, to use own initiative and act independently and the discretion allowed to the jobholder to take action. It takes account of any restrictions on the jobholder's freedom to act imposed by, for example, supervisory control, instructions, procedures, practices and policies, professional, technical or occupational codes of practice or other ethical guidelines.

General point:

Answer the Yes and No questions first and then allocate examples to the Yes box options.

2.1.1 Is your work checked on a regular basis?	Describe how often your work is checked (e.g. daily) and who checks it. e.g. My supervisor checks my work at the end of each day, she also checks any large pieces of work as soon as I have completed them.
12.1.2 Is your work checked on a sample/random basis?	Describe how often your work is checked and who checks it.
12.1.3 Is your work assessed at agreed intervals?	Describe how often your work is reviewed (e.g. monthly or quarterly), assessed or checked and who does this.
12.1.4 Is your supervisor / manager generally close by or immediately contactable?	Is your supervisor/ manager usually available to answer any queries and how often you usually refer queries to him/her. e.g. My supervisor is generally available to answer queries, and I usually refer a query to her once a day.
12.1.5 Is your supervisor / manager generally only available at specific times?	If your supervisor/ manager is not readily available, describe when and how often you contact him/ her for guidance.
12.1.6 Do you refer to people outside the organisation for guidance?	Describe who (job title only) you would contact for guidance, why and how often.
12.1.7 Are you a lead specialist, professional or expert in your field?	Say whether you are a specialist or expert in your field and describe how many other specialists/ professionals/ experts there are and what they do in relation to your job.

<p>12.2 Describe the areas of responsibility where you would act yourself without asking for assistance</p>	<p>Give examples of tasks/ situations which you would typically deal with on your own.</p>
<p>12.3 Describe the areas of responsibility where you would ask for assistance</p>	<p>Give examples of tasks/ situations which you would typically discuss with or refer to your manager/ supervisor/ other person for assistance/ guidance.</p>
<p>12.4 Constraints, policies and procedures</p>	<p>Answer the Yes and No questions first and then allocate examples to the Yes box options.</p>
<p>12.4.1 Are there clear policies and procedures that you are not allowed to deviate from?</p>	<p>Give examples (e.g. I am required to follow financial procedures which cover all my invoicing work. I cannot deviate from these without the approval of my supervisor.)</p>
<p>12.4.2 Are you required to work to policies and procedures (SOPs), but use your initiative when non-routine situations arise?</p>	<p>Give examples of the policies and procedures (rules) that govern what you do and how you do it (unless covered above) and describe tasks/ situations where you are required to use your initiative.</p>
<p>12.4.3 Do you work to clear professional or occupational policies and are accountable for your own professional actions?</p>	<p>Give examples of the policies, procedures and professional guidelines that govern your work.</p>
<p>12.4.4 Do you work to broad professional standards and have significant discretion to operate within these?</p>	<p>Describe the professional guidelines that govern your work and any discretion you have to work within these.</p>

<p>12.4.5 Are you responsible for determining how certain broad policies should be put into practice?</p>	<p>Give examples of the policies you are required to interpret and put into practice and the areas (departments etc.) impacted on by these.</p>
<p>12.4.6 Are you required to take action based on your own interpretation of national policies/legislation/initiatives?</p>	<p>Give examples of policies/ legislation/ initiatives you are required to introduce/ implement and the areas (departments etc.) impacted on by these.</p>
<p>2.4.7 Are you responsible for setting targets and goals for a department / division / service / organisation?</p>	<p>Give examples of the targets and goals you are required to implement and the area they impact on.</p>

[Back to contents page](#)

Factor 13 - Physical effort

This factor measures the physical effort (sustained effort at a similar level or sudden explosive effort) required for the job. It takes account of any circumstances that may affect the degree of effort required, such as working in an awkward position or confined space.

General point:

It is important to complete all the boxes on each row that has a Yes

13.1.1 Lifting, pushing, pulling objects?	Give examples of the equipment, including trolleys, wheelchairs etc which you need to push or pull.
13.1.2 Bending, kneeling, crouching, stretching?	Give examples of when you have to bend, kneel, crouch, twist, bend or stretch in order to carry out your duties.
13.1.3 Crawling, climbing?	Give examples of when you have to crawl or climb in order to carry out your duties.
13.1.4 Working in physically cramped conditions?	Give examples of when you have to work in cramped conditions in order to carry out your duties.
13.1.5 Working at heights?	Give examples of when you have to work at heights.
13.1.6 Standing/sitting with limited scope for movement for long periods?	Give examples of where you have to stand or sit without being able to move significantly for long periods.
13.1.7 Walking for substantial periods of time?	Give examples of where you have had to walk for long periods as part of your job.
13.1.8 Making repetitive movements?	This covers tasks which require you to keep making the same movement (e.g. assembling sterile supplies trays, labelling large quantities of bottles). Give examples of this type of movement and describe why you are required to make them.
13.1.9 Controlled restraint? i.e. jobs requiring training/ certification in this	Give examples of situations where you are required to use controlled restraint and whether you are required to be trained and certificated in this as a job requirement.

13.1.10 Running?	Give examples of when you have to run as part of your job.
13.1.11 Lifting weights/equipment with mechanical aids?	Give examples of the people/ equipment/ items you have to lift and the mechanical aids that you use.
13.1.12 Clearing tables?	Give examples of when you have to clear tables as part of your job.
13.1.13 Manoeuvring/manipulating objects/ people	Give examples of when you have to manoeuvre people or objects e.g. positioning patients for radiography, manoeuvring patients onto a commode, manoeuvring maintained engine parts back into place using a hoist.
13.1.14 Transferring people from bed to chair or similar?	Give examples of when you have to transfer patients /clients from bed to chair, or similar activity.
13.1.15 Lifting weights/equipment without mechanical aids?	Give examples of the people/ equipment/ items you have to lift.
13.1.16 Manual digging?	Give examples of when you have to dig using a spade or fork.
13.1.17 Heavy-duty pot washing / oven cleaning?	Give examples of the heavy-duty pot washing, oven cleaning or similar heavy strenuous work you are required to carry out and the equipment you use to do it.

[Back to contents page](#)

Factor 14 - Mental effort

This factor measures the mental effort (concentration, responding to unpredictable work patterns, interruptions) required for the job.

General point:

This should be the total amount of time spent on this activity each shift.

14.1 Concentration	E.g. 1 I check staff expense forms to ensure that they follow guidelines. They are often difficult to read.
How many shifts during the week column	Indicate the number of shifts on which you undertake these activities over an average week. If less than weekly, state frequency e.g. 1 shift.
14.1 Describe the duties that you undertake that require concentration. List the most important first	For example, checking detailed documents; carrying out calculations; analysing statistics; participating in hearings; operating machinery; driving; clinical coding; taking formal minutes of meetings; report writing; carrying out screening tests/microscope work, therapy, intricate clinical interventions; examining or assessing patients/clients; undergoing cross examination in court.
14.2 Interruptions	Give examples of occasions when you have been interrupted and have had to change what you were doing, or planning to do, that day. Describe the interruption, what you had been doing and what you had to start doing as a result of the interruption. If you are interrupted in the course of your work, describe the nature of the interruption and say whether you have to stop what you are doing to respond to the interruption and whether you have to re-prioritise your work as a result of it. State how often this happens.

[Back to contents page](#)

Factor 15 - Emotional effort

This factor measures the emotional effort required to undertake clinical or non-clinical duties that are generally considered to be distressing and/or emotionally demanding.

Please complete the table below, indicating whether you carry out the activities listed as examples.

15.1.1 - Processing (e.g. typing / transmitting) news of highly distressing events	Describe when, how often and why you have had to type or pass on highly distressing information, e.g. child abuse; family breakdown; severe injuries. e.g. I type reports which contain details of child abuse about once a month for my manager.
15.1.2 - Providing a service for distressed/ angry patients/ clients/ staff	Give examples of occasions when you have had to provide a clinical, professional or administrative service to people who are very upset or annoyed.
15.1.3 - Giving unwelcome news to patients/ clients/ carers/ staff	Give examples of occasions when you have had to tell people un-welcome news This may include cancelling patient appointments; refusal of holiday requests; 'difficult' treatment plans.
15.1.4 - Dealing with difficult situations/ circumstances	Give an example of difficult situations (e.g. child abuse; family breakdown) that you have direct exposure to. Describe your role and your professional relationship with them.
15.1.5 - Designated to provide emotional support to front line staff	Give an example of the emotional support you provide and why it is necessary. This may be, for example, support for staff following an emergency situation, or when they have been dealing with aggressive/ depressed patients.
15.1.6 - Caring for the terminally ill	Describe your responsibility for terminally ill people and the nature of your professional relationship with them.
15.1.7 - Providing a therapy service to emotionally demanding patients/ clients/ staff	Give an example of the therapy you provide and include why the patients/ clients/ staff are emotionally demanding.
15.1.8 - Communicating life changing events to patients / clients / staff	This includes informing a patient of the need for major surgery; terminal illness; necessary changes to their lifestyle following surgery/ treatment; death of a relative or informing a staff member of redundancy.
15.1.9 - Dealing with people with challenging behaviour	Give an example of where you have direct exposure to people with challenging behaviour. Describe your role and professional relationship with them.
15.1.10 - Arriving at the scene of a distressing incident	Give an example of where you have arrived at the scene of a distressing incident.

Factor 16 - Working conditions

This factor measures the demands arising from inevitably adverse environmental conditions (such as extreme heat/cold, smells, noise, fumes) and hazards, which are unavoidable (even with the strictest health and safety controls), such as road traffic accidents, spills of harmful chemicals, aggressive behaviour of patients, clients, relatives, carer).

16.1 Please describe where you work. If you work in more than one area, state the percentage of time in each.	Describe your working environment (e.g. office; hospital wards; laboratory etc.) and if more than one area, state the proportion of time spent in each. E.g. I spend 30% of my time in the office, 30% in clinics and 40% on hospital wards.
16.2.1 Using transport on a regular basis	Describe when you are required to travel by car, bus, train, Public Service Vehicle (PSV) or bike and for what purpose. Indicate if you are required to drive or if you are being driven.
16.2.2 Using road transport in emergency situations	Describe when you are required to use road transport in emergency situations and for what purpose. Indicate if you are required to drive or if you are being driven.
16.2.3 Outdoor working	Describe when you are required to work outside.
16.2.4 Using a computer/VDU for the majority of the shift	Describe what you use a VDU for and how long you use it for per shift (excluding breaks).
16.2.5 Extreme temperatures	Describe when you are exposed to excessive temperatures, e.g. working in a boiler room, storage freezer.
16.2.6 Unpleasant smells or odours	Describe when you are exposed to unpleasant smells e.g. chemicals, sewers, or people in certain circumstances.
16.2.7 Excessive noise or vibration	Describe when you are exposed to excessive noise or vibration e.g. industrial sewing machine, power tools.
16.2.8 Dust or dirt	Describe when and why you are exposed to dust or dirt.
16.2.9 A humid atmosphere	Describe when you are exposed to warm and damp air conditions (e.g. in a laundry).

16.2.10 Dangerous chemicals / substances in containers	Describe when you are required to work directly with containers containing dangerous chemicals or substances (e.g. sealed slides or tubes containing HIV infected blood).
16.2.11 Aggressive verbal behaviour	Describe when and why you are directly exposed to aggressive verbal behaviour such as shouting, swearing and verbal abuse.
16.2.12 Unpleasant substances/ non household waste	Describe when and why you are directly exposed to unpleasant substances e.g. chemical cleaning materials, sewage, rubbish disposal.
16.2.13 Severe weather condition	Describe when and why you are directly exposed to severe weather conditions.
16.2.14 Noxious fumes	Describe when and why you are exposed to unpleasant fumes which could be harmful if health and safety requirements are not followed.
16.2.15 Infectious materials or foul linen	Describe when and why you are exposed to infectious materials (e.g. bandages, swabs from surgical procedures), or foul linen (e.g. clothes/ sheets soiled with blood, urine or faeces). Say whether you are required to have direct contact with these.
16.2.16 Fleas and lice	Describe when and why you are exposed to fleas or lice.
16.2.17 Bodily fluids, faeces, or vomit	Describe when and why you are exposed to body fluids, faeces, vomit e.g. while providing personal care. Say whether you are working in areas where body fluids etc. are present, or whether you have direct contact with them (e.g. cleaning them up).
16.2.18 Aggressive physical behaviour	Describe when and why you are exposed to situations where you may be threatened with violence or actually attacked.
16.2.19 Dangerous chemicals or substances that are not contained	Describe your exposure and why e.g. mercury fillings during dental procedures, chemicals present at RTAs or other uncontrolled situations. Do not include situations where potential hazards are controlled through health and safety regulations.
16.2.20 Life threatening hazards	Describe when and why you are exposed to hazards, not included above, which carry the risk of serious injury or damage to health.

[Back to contents page](#)

Appendix 1 - Additional guidance on factor 2 - Knowledge, training and experience

General points:

Consider the main types of knowledge required for your work and state them under the most appropriate question heading, starting with the one that is the most central to your job (e.g. scientific knowledge for biochemists). Only list qualifications once, in the most relevant section (e.g. a nursing qualification in the clinical knowledge section).

Qualifications indicate that the level of knowledge required must be of an equivalent level to the stipulated qualification not that there is a requirement to hold any particular qualification. Training towards qualifications is a means of acquiring knowledge as is on-the-job training, short courses and practical experience. If a job does genuinely require the knowledge acquired through a specified formal qualification, then this should be recorded.

This factor measures the minimum knowledge required by a competent performer to do the job to the required standards. You may have different or higher qualifications than those required for the job, but these should not be included.

Where qualification and/or experience requirements for a job have changed over time, the current requirements should be entered. As it is the job that is evaluated, jobholders in post with previous qualifications are deemed to have achieved the current qualification level through on the job learning and experience. You may need to consult your line manager on the current qualification and/or experience requirements that are actually needed for your post.

A person specification may set out the qualifications and experience required, but you should bear in mind that it may underestimate the knowledge actually needed to carry out the job because it is set at recruitment level on the expectation that the rest of the required knowledge will be acquired through on the job training and experience, for example, the person specifications for:

- Clerical posts typically state the recruitment level of knowledge as a number of GCSEs, whereas the actual knowledge requirement includes a range of clerical and administrative procedures.
- Managerial posts may state the recruitment level of knowledge as a number of GCSEs plus a specified period of health service experience, whereas the actual knowledge requirement includes the range of administrative procedures used by the team plus supervisory/managerial knowledge or experience.
- Healthcare jobs may state that a form of specialist knowledge is desirable, rather than essential, because the trust is willing to provide training in the particular specialist field.