

[IMPORTANT: The information and materials contained herein should not be considered or relied upon as legal advice on specific factual situations. Users are urged to consult legal counsel concerning particular situations and specific legal questions.]

BASICS OF PREPARING A JOB DESCRIPTION

A good job description will help minimize hiring liabilities!

A carefully written job description allows the employer and the employee to understand their responsibilities and for the employee to be clear on his/her role within the firm. It will also provide both parties with a fair and honest measurement of what is expected and what is to be accomplished. No matter what size firm, this advice should be followed.

The job description should be viewed as a contract between the employer and the employee, allowing the employer to focus on:

⇒ **Main Job Responsibilities:**

- Daily, weekly, monthly, quarterly and, perhaps, yearly duties
- Duties or projects that need to be performed or accomplished on an occasional but ongoing basis

⇒ **Secondary Responsibilities:**

- Special Projects?
- Coverage when co-workers are out sick or working on special projects

⇒ **Working knowledge, education and skill:**

- Outline knowledge, education, skill, etc. that you would like the "perfect" candidate to possess
- Include a list of equipment and software used in the job
- Decide before you start or early on in the interviewing process in which areas you are willing to compromise if the perfect candidate does not materialize

It is important to remember that a detailed job description is as critical to the employer as the employee. It provides supervisors and managers with an opportunity to clearly define what they want, need or expect, allowing for the tone to be set for both parties. It is also a tool to use in measuring whether the employee is meeting, exceeding or failing in the responsibilities he/she was hired to accomplish.

(Accounting Firm's Name)
Job Description

JOB TITLE: (In this space list what the title of the position is)

EXEMPT: (Yes or No)

FIRM: (List firm's name)

SHIFT: (List hours to be worked, with the exceptions; e.g., tax time)

DEPARTMENT: (List Department)

LOCATION: (Address of firm)

REPORTS TO: (Name, title, i.e., audit, manager, tax in-charge)

PREPARED BY: (Who prepared)

DATE: (Date of job description)

APPROVED BY: (Responsible partner) DATE: (Date of approval)

SUMMARY: (This is the section that you address main job responsibilities and secondary responsibilities)

(Will the employee assist in development of or implementation of any programs or special projects?)

(Will this position have high or low exposure to clients)

ESSENTIAL DUTIES AND RESPONSIBILITIES:

(You must be very specific in this area of all responsibilities and duties that are expected)

JOB QUALIFICATIONS:

(What abilities or skill level the employee needs to have)

Examples: Good writing and oral communication skills. Understanding of the working of a practice, i.e., tax, audit or technical knowledge level. Professional demeanor and cooperative attitude.

QUALIFICATION REQUIREMENTS:

(To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.) **(This is just an example of language you may want to use)**

EDUCATION AND/OR EXPERIENCE:

(This will be where you list your educational requirements and/or experience level.)

LANGUAGE SKILLS:

(Sample of what you may want to say) Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures or government regulations. Ability to effectively present information and respond to clients' or managers' questions.

MATHEMATICAL SKILLS:

(Sample of what you could say) Ability to calculate figures and amounts such as discounts, interest, commissions, proportions and percentages.

REASONING ABILITY:

(Sample of what can be said) Ability to define problems, collect data, establish facts and draw valid conclusions. Ability to interpret a variety of technical instructions and reach reasonable conclusions after analyzing multiple variables.

PHYSICAL DEMANDS:

(Sample language) The physical demands described here are representative of those that must be met by an employee to successfully perform the

essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is required to sit; use hands to finger, handle or feel objects, tools or controls; reach with hands and arms; and talk or hear. The employee is occasionally required to stand and walk.

The employee must occasionally lift and/or move up to (xx) pounds. Specific vision abilities required by this job include close vision, distance, vision, peripheral vision and the ability to adjust focus.

(This is an area that you will need to tailor to your specific office)

WORK ENVIRONMENT:

(Sample language) The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate (or whatever is pertinent to your office).