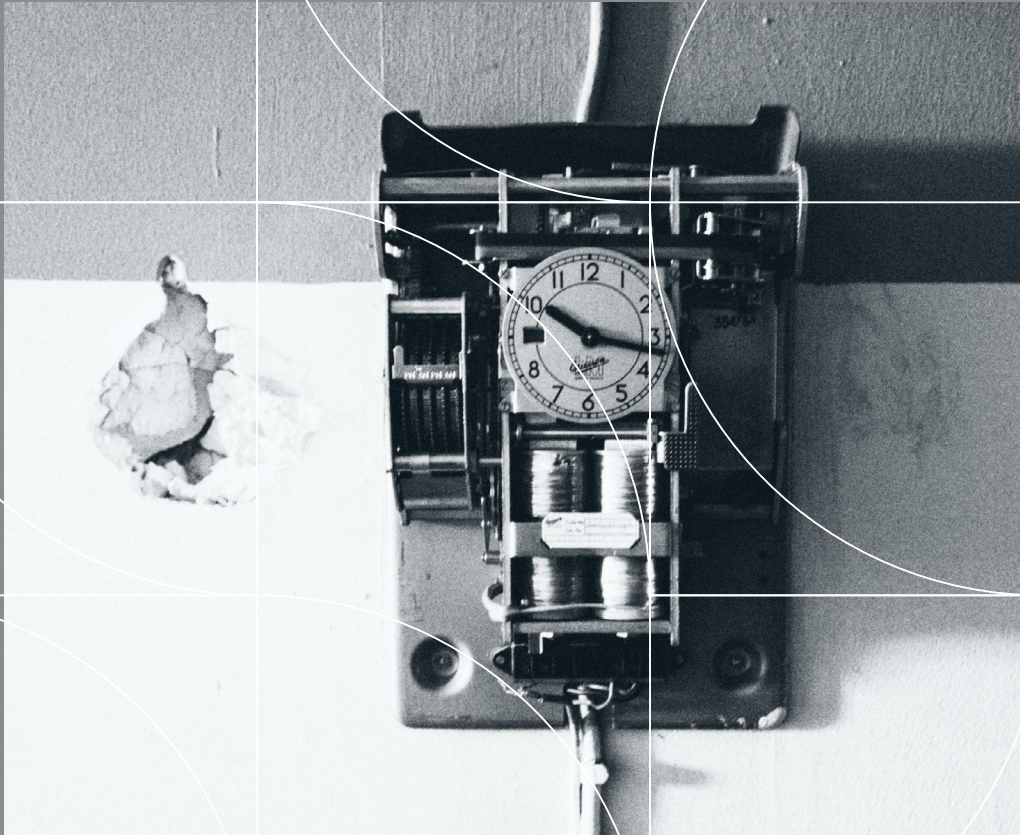




# Sample Job Assessment Questionnaire Form



In this excerpt from our FLSA Handbook, we provide a is a “Sample Job Assessment Questionnaire Form” which is useful for reviewing exempt classification. The Handbook’s appendices contain two sets of guidelines to support the review of employees’ exempt classification. We provide a link to Appendix 8 because it is practical and user-friendly.

If you find this content valuable and would like to download the full handbook, please fill out this [form](#).

**Appendix 8: Sample Job Assessment Questionnaire Form**

**JOB ASSESSMENT QUESTIONNAIRE FORM**

***This questionnaire is attorney work product that is being completed by and for the use of legal counsel. Though the purpose of the questionnaire is to help gather factual information, the underlying goal is to be able to use that information to render legal advice. The questionnaire is privileged and confidential, as are the questions asked and answers provided in completing it.***

**A. Background Information (for Completion by Support Staff, if Possible)**

A-1. Position audited	
A-2. Date of interview	
A-3. Company interviewee name and title	
A-4. Interviewer name	
A-5. No. of incumbents	
A-6. States in which they work	
A-7. Lowest salary	
A-8. Highest salary	
A-9. Title and no. of direct reports	
A-10. Title of direct supervisor (if different from the interviewee)	

**B. Primary Duty**

B-1. Describe the function or purpose of the department/team on which the job is located.
B-2. Describe how is the department/team organized—for example, who reports to whom and how many are in each position.
B-3. Does this position have a degree and/or advanced training requirement or strong preference? If <b>YES</b> , describe the requirement or preference.
B-4. Do incumbents perform work of a driver, loader, or driver's helper on vehicles weighing over 10,000 pounds? If <b>YES</b> , describe their responsibility and note whether they adhere to any DOT requirements (e.g., maintaining a Commercial Driver's License).

B-5. Describe the position's most important duty. If there are multiple incumbents, some of whom perform differing primary duties, note that.
B-6. Describe the hours incumbents work, including, for example, normal hours each day, total hours each week, and whether any work is performed after leaving the office (e.g., on the weekend, on the road, etc.). If possible, distinguish normal and busy periods, noting when the periods occur and how long they last.
B-7. How does an incumbent's time break down over a typical day or week (e.g., 30% creating designs using CAD; 30% working with clients to ascertain requirements; 20% reviewing changes to plans; and remainder administrative). For each bucket of time, describe the types of tasks performed and decisions/recommendations made by incumbents.
B-8. If incumbents supervise other employees, do they perform any of the same duties as those they supervise? If YES, describe the duties and the extent of the overlap.
B-9. Do incumbents perform any routine/manual tasks? If YES, describe the duties, the extent of the duties, and whether they are performed concurrently with non-routine duties.

**C. Administrative Exemption Inquiry**

C-1. In carrying out their most important duty (see B-5), do incumbents interpret, change, or implement any Company policies? If so, describe their involvement.
C-2. In carrying out their most important duty (see B-5), do incumbents carry out major assignments or projects? If so, describe their involvement.
C-3. In carrying out their most important duty (see B-5), do incumbents have authority to negotiate and/or bind the Company? If so, describe their involvement.
C-4. In carrying out their most important duty (see B-5), do incumbents represent the Company in dealings with third-parties? If so, describe their involvement.

C-5. In carrying out their most important duty (see B-5), do incumbents plan short-, medium-, or long-term business goals? If so, describe their involvement.
C-6. In carrying out their most important duty (see B-5), do incumbents investigate matters on behalf of upper management? If so, describe their involvement.
C-7. In carrying out their most important duty (see B-5), do incumbents make or recommend other important decisions not discussed already? If so, describe what incumbents' decisions or recommendations concern, how they make them, and the nature of any higher-level review.

**D. Executive Exemption Inquiry**

D-1. Do incumbents each supervise at least two full-time employees? If YES, describe such supervision. If NO, skip to Section E.	<input type="checkbox"/> YES <input type="checkbox"/> NO
D-2. Do incumbents have authority to hire, fire, or promote employees? If YES, describe such authority.	<input type="checkbox"/> YES <input type="checkbox"/> NO
D-3. Do incumbents have authority to <i>recommend</i> the any of the decisions noted in D-2? If YES, describe such recommendation authority, including how often their recommendations are followed. If NO, proceed to Section E.	<input type="checkbox"/> YES <input type="checkbox"/> NO
D-4. In carrying out their most important duty (see B-5), do incumbents conduct orientation and/or training of employees? If so, describe their involvement.	
D-5. In carrying out their most important duty (see B-5), do incumbents mentor, coach, and/or evaluate employees? If so, describe their involvement.	

D-6. In carrying out their most important duty (see B-5), do incumbents set pay and/or hours of work for employees? If so, describe their involvement.
D-7. In carrying out their most important duty (see B-5), do incumbents plan and/or direct the work of employees? If so, describe their involvement.
D-8. In carrying out their most important duty (see B-5), do incumbents have authority to handle employees' complaints? If so, describe their involvement.
D-9. In carrying out their most important duty (see B-5), do incumbents have authority to discipline employees? If so, describe their involvement.
D-10. In carrying out their most important duty (see B-5), do incumbents have involvement in planning or controlling the budget? If so, describe their involvement.
D-11. In carrying out their most important duty (see B-5), do incumbents have responsibility for employee and/or customer safety, asset protection, and/or legal compliance? If so, describe their involvement.
D-13. In carrying out their most important duty (see B-5), do incumbents perform any managerial functions not described above? If so, describe their involvement.

**E. Computer Employee Exemption Inquiry**

E-1. Does the job's most important duty (see B-5) consist of programming, software engineering, computer systems analysis, or similar, high-level computer work? Note that this does not include troubleshooting or computer equipment repair. If YES, describe the duties. If NO, proceed to Section F.	<input type="checkbox"/> YES <input type="checkbox"/> NO

E-2. Does the job require a computer-related degree or other advanced training? If YES, identify the degree and describe the requirement.	<input type="checkbox"/> YES <input type="checkbox"/> NO

**F. Outside Sales Exemption Inquiry**

F-1. Does the job's most important duty (see B-5) consist of making sales or obtaining orders/contracts? If YES, describe such sales efforts. If NO, proceed to Section G.	<input type="checkbox"/> YES <input type="checkbox"/> NO
F-2. Do incumbents regularly and customarily work to make such sales outside the office (be it a corporate office or home office)? If YES, detail the nature of the sales efforts and where they take place. If NO, proceed to Section G.	<input type="checkbox"/> YES <input type="checkbox"/> NO
F-3. Describe the extent of such outside sales activity, such as out-of-office visits per day and week, the duration of such visits, and percentage of time devoted to outside sales.	

**G. Creative Professional Exemption Inquiry**

G-1. Does the job's most important duty (see B-5) consist of invention, imagination, originality, or talent in writing, music, acting, or graphic arts? If YES, describe the incumbents' work in this regard. If NO, proceed to Section H.	<input type="checkbox"/> YES <input type="checkbox"/> NO
G-2. For any content or material that incumbents create, describe what direction, if any, they receive on what the content or material should convey or contain. Stated differently: what restrictions, if any, are placed on their creativity or originality?	

**H. Wrap-Up Questions**

H-1. What makes someone an ideal candidate for this job?
H-2. What makes somebody excellent at carrying out this job?

<p>H-3. Have any incumbents complained, formally or informally, about overtime work, overtime pay, or related matters? If <b>YES</b>, describe the complaint(s), including when it was made, by whom, and how it was resolved.</p>	<input type="checkbox"/> YES <input type="checkbox"/> NO
<p>H-4. Please note any areas of specific concern arising during the course of or following the interview.</p>	



If you find this content valuable and would like to download the full handbook, please fill out this [form](#).



“Seyfarth” and “Seyfarth Shaw” refer to Seyfarth Shaw LLP, an Illinois limited liability partnership. Our London office operates as Seyfarth Shaw (UK) LLP, an affiliate of Seyfarth Shaw LLP. Seyfarth Shaw (UK) LLP is a limited liability partnership established under the laws of the State of Delaware, USA, and is authorised and regulated by the Solicitors Regulation Authority with registered number 556927. Legal services provided by our Australian practice are provided by the Australian legal practitioner partners and employees of Seyfarth Shaw Australia, an Australian partnership. Seyfarth Shaw (賽法思律師事務所) is a separate partnership operating from Hong Kong as a firm of solicitors.