

CLERK SERIES

| <u>Code No.</u> | <u>Class Title</u> | <u>Occ. Area</u> | <u>Work Area</u> | <u>Prob. Period</u> | <u>Effective Date</u> |
|-----------------|----------------------|------------------|------------------|---------------------|-----------------------|
| 0826(0731) | Clerical Assistant | 04 | 590 | 6 mo. | 09/05/00 |
| 0827(0731) | Clerk | 04 | 590 | 6 mo. | 09/05/00 |
| 0759 | Chief Clerk | 04 | 590 | 6 mo. | 09/05/00 |
| 0808 | Staff Clerk | 04 | 590 | 6 mo. | 09/05/00 |
| 0747 | Administrative Clerk | 04 | 590 | 6 mo. | 09/05/00 |

Promotional Line: 41

Series Narrative

Employees in positions allocated to this series perform or supervise clerical and keyboarding duties involving a wide variety of office practices, procedures and routines. Clerks typically are involved in the processing of documents or transactions. They provide a variety of support services to the technical, professional, administrative or management operations of an organization. A progression of responsibility is evident in this series and ranges from simple, routine and repetitive duties performed under direct supervision to duties that are complex and highly diversified requiring the exercise of discretion and independent judgment performed under administrative direction.

Duties performed may include but are not limited to: maintaining records and information in hard copy or electronic form; receiving, screening, reviewing and verifying documents; searching for and compiling information and data; providing information on the activities of the organization orally or in writing; preparing and/or verifying the validity of documents with which the organization is concerned; and keyboarding material. Any or all of these functions may be performed singly or in combination. Duties may involve use of standard office equipment, reprographic and/or electronic equipment.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Clerical Assistant

0826

Employees in positions allocated to this level of the series work under direct supervision in support of an office or organization. They perform routine office support tasks, which require knowledge of standard office procedures, the ability to operate a variety of office equipment, and the ability to operate computer systems, using word processing, database and software packages.

A Clerical Assistant typically –

1. creates, updates, and revises records or files of average difficulty, which may include confidential materials
2. files materials/documents in established alphabetical, chronological and numerical filing systems
3. retrieves data from computerized, microform or hard copy records and files
4. codes information from source documents by applying established, clearly defined codes

5. reviews documents for completeness of a few specific items
6. maintains fiscal records by entering expenditures and income to unit accounts
7. prepares simple factual statements or reports involving computations such as totals or subtotals
8. keyboards from straight copy routine documents such as correspondence, brief reports, exams and other course material and forms
9. proofreads documents and corrects errors
10. sorts and distributes mail
11. replies to routine inquiries by sending appropriate form letter response or filling requests for materials
12. requests or transmits factual information
13. greets visitors, answers telephone, and relays calls and messages to appropriate staff members. Responds to requests for readily available factual information.
14. schedules meetings when time, place and participants are specified
15. issues office supplies and maintains records of supplies used in a unit
16. performs other related duties as assigned

Level II: Clerk**0827**

Employees in positions allocated to this level of the series work under general supervision in support of an office or organization. They perform office support tasks requiring knowledge of general office and departmental procedures and methods, ability to operate a variety of office equipment, and the ability to operate computer systems, using word processing, database and software packages.

A Clerk typically –

1. creates, updates, revises and retrieves files and records involving indexing and cross-filing requirements with responsibility for maintaining adequate, accurate and accessible information, which may include confidential materials
2. codes data where knowledge of a complex coding system is required
3. checks documents for overall completeness and accuracy of information
4. maintains complete and accurate records of unit fiscal transactions
5. reconciles discrepancies between unit records and those of other university departments
6. bills, receives, and records payments; prepares receipts and deposits

7. composes correspondence with responsibility for accurately stating factual information which may be gathered from a number of readily available sources
8. develops and modifies form letters and intra-office forms
9. collects, compiles and organizes information for recurring reports
10. keyboards documents such as correspondence, reports, exams and other course material, speeches, bulletins, and similar materials with responsibility for determining format and correcting errors in sentence and paragraph structure as well as errors in spelling, punctuation and grammar
11. screens telephone calls and visitors; determines needs and personally handles routine inquiries, requests and/or problems, provides factual information regarding unit regulations and procedures
12. schedules space, equipment and/or activities for a service facility via manual or computerized system
13. maintains and orders supplies
14. assigns and reviews work performed by other clerical employees of same or lower level
15. performs other related duties as assigned

Level III: Chief Clerk**0759**

Employees in positions allocated to this level of the series work under direction in support of an office or organization. They perform a wide variety of office support tasks, which require the use of judgment and initiative and the ability to operate computer systems, using word processing, database and software packages. Knowledge of the organization, programs, practices and procedures of the unit is central to the performance of the duties.

A Chief Clerk typically –

1. establishes, modifies, and/or supervises the maintenance of comprehensive file and record systems for a large and complex unit, which may include confidential materials
2. reviews documents to determine adequacy or acceptability of information provided
3. signs/approves correspondence, requisitions, vouchers, and similar documents as directed
4. maintains records of unit fiscal transactions involving a variety of accounts and provides advice regarding the appropriateness of requested expenditures
5. makes cost estimates and comparisons for goods and services
6. compiles, summarizes and organizes information from a variety of sources for use in reports, brochures and publications
7. coordinates unit operational projects, meetings, conferences, and travel arrangements and monitors and expedites progress

8. gathers and provides information through identification and selection of appropriate sources
9. composes correspondence containing subject matter knowledge of the activities or procedures of the unit
10. plans, organizes, assigns and reviews the work of the unit's clerical staff and participates in their selection, training, and evaluation
11. performs other related duties as assigned

Level IV: Staff Clerk**0808**

Employees in positions allocated to this level work under direction to provide staff assistance for a major campus/university department. They function as an agent of the unit or organization by performing highly specialized clerical support duties. An in-depth knowledge of the organization, programs, policies and procedures of the unit is essential to the performance of the duties, along with the ability to use good judgment, the ability to operate computer systems, using word processing, database and software packages, and to exercise discretion in handling sensitive and confidential information.

A Staff Clerk typically –

1. studies and makes recommendations for modifications to existing recordkeeping systems, implements approved changes and devises new filing or recordkeeping procedures
2. establishes and maintains confidential records and files
3. reviews and analyzes forms and documents to determine adequacy and acceptability of information provided
4. signs/approves documents to authorize various transactions processed by the unit
5. monitors the operating budget of the unit and participates in budgetary control. Assists in the preparation of budget analyses and reports
6. recommends purchases for the unit based on study of cost estimates and comparisons for goods and services
7. researches and reports information which requires the evaluation of sources or the application of regulations and procedures to specific cases
8. provides technical advice and information in a specialized clerical support area
9. answers questions requiring the application of regulations and procedures to specific problems or transactions on a case-by-case basis
10. represents unit at meetings related to specialized area of responsibility
11. coordinates the flow of information submitted by various segments or units
12. composes substantive correspondence, memos and reports

13. plans organizes, assigns and reviews the work of the unit's clerical staff and participates in their selection, training and evaluation
14. performs other related duties as assigned

Level V: Administrative Clerk**0747**

Employees in positions allocated to this level of the series work under administrative direction in support of a major academic or administrative unit. They are responsible for initiating and coordinating the office support functions required for the effective implementation of administrative policies of the unit. Duties performed require extensive knowledge of the organization, programs, policies, and procedures of the unit and the institution and the ability to operate computer systems, using word processing, database and software packages.

An Administrative Clerk typically –

1. develops and implements procedures and recordkeeping systems to support the clerical functions performed by the unit
2. serves as a resource person for staff of external units
3. answers inquiries and resolves problems which require interpretation, explanation and justification of administrative and programmatic policies and procedures
4. directs and coordinates all clerical functions of a unit, as performed by a staff of lower rank, with full accountability for the results produced
5. reviews overall work production, cost, equipment and staff resource utilization to evaluate progress in achieving goals, objects, and cost effectiveness. Recommends/implements actions to improve overall effectiveness
6. performs quality control review of a variety of administrative documents or transactions
7. monitors fiscal transactions and accounts of a major unit with responsibility for overall control. Authorizes fiscal transactions and keeps management informed of overall financial position. Prepares reports and budget projections
8. signs/approves correspondence, requisitions, vouchers and similar documents
9. prepares reports which require the synthesis or integration of a variety of subject areas or the summation of the individual contributions of staff members or sub-units
10. composes correspondence, which requires the interpretation, explanation, or defense of unit policies and guidelines, administrative or programmatic functions.
11. conducts extensive research assignments involving the evaluation, selection and compilation of information from a wide variety of sources
12. assists research investigators in report and proposal preparation

13. performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Clerical Assistant

0826

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination of the following types of preparation:
 - (a) work experience performing simple repetitive clerical activities
 - (b) college or university coursework in Office Occupations, Business Administration, Business Education or closely related fields
 - (c) vocational training which provided a knowledge of generally accepted clerical procedures comparable to that gained in "b" above
 - (d) college or university course work in any curriculum

that totals 1.0 unit according to the following conversion rates:

6 months of "a" = 1.0 unit

12 semester hours of "b" = 1.0 unit

6 months of "c" = 1.0 unit

24 semester hours of "d" = 1.0 unit.

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Basic knowledge of simple repetitive office practices and procedures
2. Ability to keyboard accurately at a rate of 25 net w.p.m.
3. Working knowledge of spelling, grammar, punctuation, sentence and paragraph structure
4. Ability to operate document production, reprographic to other standard office equipment
5. Ability to follow routine written and oral instructions

6. Skill in oral and written communication
7. Ability to update routine records
8. Ability to perform routine subject matter filing

Level II: Clerk**0827****CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

1. High school graduation or equivalent
2. Any one or any combination of the following types of preparation:
 - (a) work experience performing routine clerical/secretarial work, including use of computer systems
 - (b) college or university coursework in Office Occupations, Business Administration, Business Education or closely related fields
 - (c) vocational training which provided a knowledge of generally accepted clerical procedures comparable to that gained in "b" above
 - (d) college or university coursework in any curriculum

that totals 1.0 unit according to the following conversion rates:

18 months of "a" = 1.0 unit

24 semester hours of "b" = 1.0 unit

12 months of "c" = 1.0 unit

48 semester hours of "d" = 1.0 unit.

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Working knowledge of routine office practices and procedures
2. Ability to keyboard accurately at a rate of 25 net w.p.m.
3. Thorough knowledge of spelling, grammar, punctuation, sentence and paragraph structure, and formatting
4. Skill in oral and written communication

5. Ability to operate document production, reprographic or other standard office equipment
6. Ability to maintain comprehensive files and records
7. Ability to make arithmetic calculations and reconcile records
8. Ability to train and review the work of others

Level III: Chief Clerk**0759****CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

1. High school graduation or equivalent
2. 12 months of work experience performing clerical/secretarial work comparable to the next lower level of this series
3. Any one or any combination of the following types of preparation:
 - (a) work experience performing clerical/secretarial work, including use of computer systems
 - (b) college or university coursework in Office Occupations, Business Administration, Business Education, or closely related fields
 - (c) vocational training which provided a knowledge of generally accepted clerical procedures comparable to that gained in "b" above
 - (d) college or university coursework in any curriculum

that totals 1.0 unit according to the following conversion rates:

24 months of "a" = 1 unit

24 semester hours of "b" = 1 unit

12 months of "c" = 1 unit

60 semester hours of "d" = 1 unit

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Extensive knowledge of secretarial and general office practices and procedures
2. Ability to keyboard accurately at a rate of 25 net w.p.m.

3. Extensive knowledge of spelling, grammar, punctuation, sentence and paragraph structure and formatting
4. Skill in oral and written communication
5. Ability to operate document production, reprographic or other standard office equipment
6. Supervisory ability

Level IV: Staff Clerk**0808**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Two years of experience performing duties at the next lower level of this series or in other positions of comparable responsibility

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Extensive knowledge of general office practices and procedures
2. Ability to keyboard accurately at a rate of 25 net w.p.m.
3. Extensive knowledge of spelling, grammar, punctuation, sentence and paragraph structure, and formatting
4. Ability to work independently and exercise judgment in order to be able to analyze and investigate a variety of questions or problems
5. Ability to organize and supervise the work of others
6. Ability to compile and organize complex statistical and narrative records and reports

Level V: Administrative Clerk**0747**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination of the following types of preparation:
 - (a) work experience performing duties at the Chief Clerk level or in other positions of comparable responsibility
 - (b) work experience performing duties at the Staff Clerk level or in other positions of comparable responsibility

that totals 1.0 unit according to the following conversion rates:

4 years of “a” = 1.0 unit

2 years of “b” = 1.0 unit.

Amounts of experience or training less than those listed above should be converted to decimal equivalent of 1.0 unit and added together when computing combinations of the different types of preparation.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Supervisory and administrative ability
2. Ability to keyboard accurately at a rate of 25 net w.p.m.
3. Ability to analyze and develop office guidelines, procedures and systems
4. Ability to select and develop appropriate criteria, methods and procedures to be utilized in order to solve problems
5. Skill in oral and written communication

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|---------------------------|---------|
| Clerical Assistant | Revised |
| Clerk..... | Revised |
| Chief Clerk..... | Revised |
| Staff Clerk..... | Revised |
| Administrative Clerk..... | Revised |