

SECRETARY SERIES

<u>Code No.</u>	<u>Class Title</u>	<u>Occ. Area</u>	<u>Work Area</u>	<u>Prob. Period</u>	<u>Last Action</u>	<u>Effective Date</u>
0845(3222)	Secretary II ¹	04	594	6 mo.	Revised	
0846(3222)	Secretary III ¹	04	594	6 mo.	Revised	
3243	Secretary IV ¹	04	594	6 mo.	Revised	
3266	Staff Secretary ¹	04	594	6 mo.	Revised	
3253	Administrative Secretary ¹	04	594	6 mo.	Revised	

Promotional Line: 49

Series Narrative

Employees in this series perform a variety of office support functions designed to implement, maintain, and execute effective office procedures and workflow. At the lower levels they are often engaged in the production of documents and other duties that support the activities and staff of an office or organization. At the higher levels, however, work may be characterized by the nature and extent of personal contacts and may be performed in direct support of a designated principal(s). A progression of responsibility is evident within the series, ranging from simple, repetitive duties performed under direct supervision to those that are diversified, require the use of discretion and independent judgment, and are performed under administrative direction.

Duties performed may include, but are not limited to, maintaining calendars, scheduling appointments, making arrangements for meetings and travel, gathering and providing information orally and in writing, developing or maintaining documents, transcribing material, performing liaison or coordination functions, processing mail, assisting in fiscal matters, maintaining or coordinating the management of files and records systems, and supervising office support services.

These duties are based on the end result, not on how the work is done, recognizing that advances in technology may have enhanced how the duties are performed.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Secretary II

0845(3222)

Employees in positions allocated to this level of the series work under direct supervision in support of a unit. They perform routine tasks, which require knowledge of standard secretarial procedures, the ability to operate a variety of office equipment, and the ability to operate computer systems utilizing various office software packages.

A Secretary II typically –

1. keyboards from straight copy routine documents such as correspondence, narrative reports, and drafts of manuscripts and forms
2. proofreads documents and corrects errors

¹Approved alternate titles for classes in this series: Level I: Office Systems Assistant II, Level II: Office Systems Assistant III, Level III: Office Systems Specialist I, Level IV: Office Systems Specialist II, Level V: Office Systems Specialist III

3. transcribes and/or records narrative material in draft form
4. requests, responds to, or transmits available factual information
5. replies to routine inquiries by sending appropriate form letter response
6. greets visitors, answers telephones, and relays calls and messages to appropriate staff members
7. schedules appointments within clearly designated time frames
8. sorts and distributes mail
9. initiates calls to obtain specific information requested by others
10. creates, updates, revises and retrieves records and files of average difficulty, which may include confidential materials
11. maintains fiscal records by entering expenditures and income to unit accounts and prepares simple, factual statements or reports
12. performs other related duties as assigned

Level II: Secretary III**0846(3222)**

Employees in positions allocated to this level of the series work under general supervision. They perform secretarial tasks requiring knowledge of general office and departmental procedures and methods, the ability to operate a variety of office equipment, and the ability to operate computer systems utilizing various office software packages.

A Secretary III typically –

1. keyboards documents such as correspondence, reports, speeches, bulletins, marketing materials, manuscripts, and similar materials with responsibility for determining format and correcting errors in sentence and paragraph structure, spelling, punctuation, and grammar
2. transcribes and/or records narrative material in final form
3. composes correspondence and brief, narrative reports with responsibility for accurately stating factual information gathered from a number of readily available sources
4. screens calls and visitors for a principal(s); determines needs and personally handles routine inquiries, requests, or problems, provides factual information regarding unit regulations and procedures
5. maintains a principal(s)' calendar, scheduling meetings and appointments and making changes as needed
6. appraises a principal(s) of upcoming events; responsible for gathering pertinent materials and information
7. makes arrangements for meetings and conferences following general instructions
8. initiates calls to obtain, verify, or clarify factual information
9. makes travel arrangements from a predetermined schedule

10. reviews principal(s)' incoming mail, responding to routine items independently and distributing remainder to the principal(s) or other appropriate staff
11. maintains complete and accurate records of unit fiscal transactions
12. 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
13. assigns and reviews work performed by other clerical employees of same or lower rank
14. performs other related duties as assigned

Level III: Secretary IV**3243**

Employees at this level of the series work under direction as the personal assistant to one or more principals. They perform a wide variety of secretarial tasks that require the use of judgment and initiative, and the ability to operate computer systems utilizing various office software packages. Knowledge of the organization, programs, practices, and procedures of the unit is central to the performance of duties.

A Secretary IV typically –

1. maintains a calendar of operating or administrative commitments and notifies the principal(s) and/or affected staff of deadlines
2. gathers, provides, and interprets information through the identification and selection of appropriate sources
3. coordinates unit operational projects, meetings, conferences, and travel arrangements and monitors and expedites progress
4. initiates contacts to clarify subjective information
5. prioritizes the principal(s)' incoming mail and drafts initial responses of the activities of the principal(s) and/or the procedures of the unit
6. composes correspondence and reports requiring knowledge of the activities of the principal(s) and/or the procedures of the unit
7. transcribes and/or records verbatim material
8. keyboards confidential and/or technical material
9. signs documents for the principal(s) as directed
10. maintains records of unit fiscal transactions involving a variety of accounts and provides advice regarding the appropriateness of requested expenditures
11. supervises the maintenance of comprehensive files and records systems for a large and/or complex unit, which may include confidential materials

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

Level IV: Staff Secretary**3266**

Employees at this level of the series work under direction as the personal assistant to one or more principals. They perform secretarial duties that provide specialized support to the principal(s) and that are closely identified with the principal(s)' viewpoint and responsibilities. An in-depth knowledge of the organization, programs, policies, and procedures of the unit as related to the work of the principal(s), along with the ability to operate computer systems utilizing various office software packages, is essential to the performance of duties, and confidence in all relevant matters is normally accorded. Employees at this level function with the independence and authority that have a significant impact on the unit.

A Staff Secretary typically –

1. establishes and revises the principal(s)' calendar, informs the principal(s) of impending engagements, and prepares necessary materials
2. relieves the principal(s) of numerous personal contacts and determines an appropriate course of action
3. serves as liaison between the principal(s) and staff of external units
4. accompanies the principal(s) and/or attends meetings participating as requested
5. coordinates logistical arrangements relating to conferences, meetings, and travel for the principal(s)
6. reviews the principal(s)' incoming mail, selects items and responds independently within scope of responsibility, and provides drafts of responses and/or relevant documentation for remaining items
7. composes correspondence, memos, and reports that represent the principal(s)' position
8. transcribes and/or records confidential or sensitive information
9. keyboards documents containing confidential or sensitive information
10. reviews and edits documents prepared by the principal(s) for content and appropriate spelling, punctuation, syntax, and format; modifies copy as necessary
11. signs documents for the principal(s)
12. maintains an awareness of the budget for which the principal(s) is responsible and participates in day-to-day fiscal decisions
13. researches and reports information which requires the evaluation of sources or the application of regulations and procedures to specific cases
14. establishes and maintains the principal(s)' confidential records and files
15. anticipates and responds to the detailed office support needs of the principal(s) through the independent performance of lower level duties or supervision of assigned staff

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

Level V: Administrative Secretary**3253**

Employees in positions allocated to this level of the series work under administrative direction as the primary assistant to the principal(s) 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 activities of the principal(s) and the organization, programs, policies, and procedures of the unit and the institution, and the ability to operate computer systems utilizing various office software packages.

An Administrative Secretary typically –

1. maintains an overall awareness of organizational activities of import or impact to the principal(s) and the unit; coordinates and expedites necessary actions
2. serves as liaison between the unit and/or the principal(s), internal staff, external units, and outside agencies
3. serves as resource person for staff of external units
4. answers inquiries and resolves problems that require the interpretation, explanation, and justification of administrative and programmatic policies and procedures
5. directs and coordinates all clerical functions of the unit with full accountability for results produced
6. analyzes work requirements for clerical staff of the unit with responsibility for establishing operating guidelines and implementing actions necessary to effectively accomplish the work
7. participates in the analysis, design, and implementation of office information systems
8. reviews and monitors unit fiscal transactions and accounts with responsibility for overall financial control
9. represents the principal(s) or the unit at meetings and conferences
10. conducts extensive research assignments
11. composes correspondence and other documents that require the synthesis or integration of a variety of subject areas or the summation of the individual contributions of staff members or sub-units
12. performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:**Level I: Secretary II****0845(3222)**

CRENDENTIALS 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, including use of computer systems
 - (b) college or university coursework in Office Occupations, Business Administration, Business Education, or closely related fields
 - (c) vocational training that 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 40 net w.p.m.
3. Working knowledge of spelling, grammar, punctuation, and sentence and paragraph structure
4. Skill in oral and written communication
5. Ability to operate standard office equipment such as document production and reprographic equipment

Level II: Secretary III

0846(3222)

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 that 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:

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 secretarial and routine office practices and procedures
2. Ability to keyboard accurately at a rate of 40 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 standard office equipment such as document production and reprographic equipment
6. Ability to utilize various software packages
7. Ability to train and review the work of others

Level III: Secretary IV

3243

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. 12 months of clerical/secretarial work experience comparable to that performed at 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 that 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:

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 40 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 standard office equipment such as document production and reprographic equipment
6. Ability to utilize various software packages
7. Supervisory ability

Level IV: Staff Secretary

3266

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 secretarial and general office practices and procedures
2. Ability to keyboard accurately at a rate of 40 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 utilize various software packages
6. Ability to work independently and exercise judgment in order to be able to analyze and investigate a variety of questions or problems
7. Ability to organize and supervise the work of others

Level V: Administrative Secretary

3253

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 Secretary IV level or in other positions of comparable responsibility
 - (b) work experience performing duties at the Staff Secretary 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 equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Ability to analyze and develop office guidelines, procedures, and systems
2. Ability to keyboard accurately at a rate of 40 net w.p.m.

3. Ability to select and develop appropriate criteria methods and procedures to be utilized in order to solve problems
4. Skill in oral and written communication
5. Ability to utilize various software packages
6. Supervisory and administrative ability

