

**NYS DEPARTMENT OF CIVIL SERVICE
SECRETARY 1 OR 2 CLASSIFICATION REQUEST QUESTIONNAIRE**

INSTRUCTIONS:

To Personnel Office: Requests for classification of a new Secretary 1 or 2 position or the reclassification of an existing position to Secretary 1 or 2 must include the secretary position description questionnaire. Incumbent and/or item information should be entered onto a CC-1 or CC-2 form by the Personnel Office.

Questions in Section I should be answered by the incumbent of the position and the questions in Section II should be completed by the supervisor. Incumbent responses should not be changed. If program management or Personnel have additional comments, they should attach them to the completed questionnaire. Also, please attach an organization chart for the unit where the incumbent works and a program description.

In the case of a new or vacant position, the supervisor should complete the questions in Section I.

To Incumbent and Supervisor:

Please copy the questions and prepare your answers to these questions on a separate sheet(s) of paper referencing the questions by their letter and number. Please be sure to put your name, title, agency name and the date on each page of your response and sign your name to the last page of Section I certifying that all your answers are correct and complete to the best of your knowledge.

Give your answers to your supervisor for review, completion of Section II and signature, and then return them to your Personnel Office for submission to the Division of Classification and Compensation.

I. Secretarial Position Questions

A. Overview of Position:

Briefly describe each task which you regularly perform as part of your job. List these tasks in priority order, with the most important being #1. Estimate the percentage of your work time which each task occupies and include that percentage with the task description.

B. Assignments and Projects:

1. List the names and titles of everyone who gives you assignments.
2. In what form(s) do the assignments come to you? How detailed are the instructions?
3. What work do you initiate on your own or do independently on a routine basis, i.e., no one regularly asks you to do it?
4. Do you set your own priorities? If yes, how do you decide what should be done first?
5. What do you do with your completed work?
6. Who reviews your work and what are they reviewing it for?

C. Office Procedures and Records Management:

1. What role do you have in establishing the office procedures that guide how work is done in your office? Do you set up, update, or have input into the formulation of the procedures? Explain.
2. What is your responsibility for the records management/filing system(s)? Did you set it up? Modify it? Do you maintain the files? Purge them? Of what do the files and/or records consist?
3. With what laws or agency policies and procedures are you required to comply or be familiar as you do your job, and how do they affect how you work?
4. What kind of follow-up system do you use? (For example, how did you establish the tickler/follow-up system? How do you maintain it on a daily basis? What actions do you take to follow up on particular correspondence, projects, etc.?)
5. What is your role in monitoring the flow of work through the office?

D. Communication:

1. How many pieces of mail do you receive on an average day? Of what does it consist? To whom is it usually addressed? What influences the volume and content? Do you handle all the correspondence for your unit? Please describe what you do with the mail. For example: Do you attach background information? Describe. Do you distribute it? To whom? Follow up on certain items? How?
2. Do you respond to correspondence yourself and/or draft responses for others? If yes, please explain how often, to what kinds of correspondence, for whom, etc.
3. Does your work bring you into face-to-face or telephone contact with other people? If yes, who are these people (e.g., other employees, general public, etc. If other employees, what are their titles?)
4. How many telephone callers do you deal with on an average day?
5. How many visitors do you deal with on an average day?
6. How do you deal with people who telephone and visitors? Do you give information, services, forms, etc.? Explain. Do you obtain information, services, forms, etc.? Explain.
7. Give examples of the kinds of questions you answer yourself.
8. Give examples of the kinds of questions you refer to others and to whom you refer them.
9. Of the questions you are asked, what percentage do you answer?
10. Do you transmit instructions or information to other staff on behalf of your supervisor or as part of your responsibility for certain procedures or projects and follow up? If yes, explain.

E. Typing and Reports:

1. What kinds of documents do you type?
2. What percentage of your total time do you spend typing?
3. What reports do you work on and what type of information do they contain? What is your role in the report preparation and production process? Describe the specific tasks you perform (e.g., gathering information [if so,

how do you do it?], formatting the information for inclusion in the report, typing and distributing the report.)

F. Supervision and Follow-up:

1. Do you supervise anyone? (This would include assigning duties, evaluating, signing time cards, etc.) If so, give names, titles, grades.
2. Do you follow up on assignments done by anyone whom you don't supervise? If so, give examples of the assignments and describe what the following-up involves.
3. Do you review completed projects or outgoing correspondence? If so, describe the types of projects or correspondence you review, for whom and what you review them for.

G. Meetings and Scheduling:

1. Do you maintain calendars for any people or facilities (e.g., meeting rooms, equipment)? If so, what does this involve?
2. Do you work on meetings? If so, describe what you do (e.g., schedule meetings, notify participants, assemble materials, take and distribute minutes, etc.).
3. Do you handle travel arrangements/vouchers? If yes, please describe what you do.

H. Miscellaneous:

1. Do you order supplies? If so, for whom? From where do you order supplies? What supplies do you order?
2. What other office equipment do you use besides typing or word processing equipment? How often do you use this other equipment?
3. Do you keep any accounting records? If so, what, and how do you do it?

Signature _____ Date _____

II. Supervisor's Statement

(To be completed by incumbent's immediate supervisor)

- A. Briefly describe your expectation of the role of the position.
- B. What program responsibilities have you delegated to the incumbent?
- C. What administrative tasks have you delegated to the incumbent?
- D. What are the critical tasks associated with the position?
- E. What are the critical skills which the incumbent must have?
- F. Please describe the degree to which the incumbent must be familiar with the substance of the program and why.
- G. If you disagree with any of the answers which the incumbent provided, or if you want to comment on or add to the answers, please do so here. Please do not change incumbent's answers.
- H. Please provide a brief program description and an organization chart. The chart should include names, Civil Service titles and item numbers; it should reflect all the people in the organization with whom the incumbent deals, especially those who are mentioned by name in this form.

Signature _____ Date _____