

# New York State Department of Civil Service

DIVISION OF CLASSIFICATION & COMPENSATION

## Classification Standard

**Occ. Code 2581100**

<b>Office Assistant 1, Grade 6</b>	<b>2581100</b>
<b>Office Assistant 2, Grade 9</b>	<b>2581200</b>
<b>Office Assistant 3, Grade 14</b>	<b>2581300</b>

## Brief Description Of Class Series

Office Assistants perform office support and clerical work to meet the requirements of agency programs. Such work may consist of, but is not limited to: data entry; math or calculations; mail, supply, and inventory-related tasks; keyboarding and other document preparation tasks; answering telephones; completing forms; assisting customers; creating or assisting in the preparation of reports, charts, graphs, and tables; and other related activities. This work is accomplished in accordance with applicable procedures, rules, regulations, and laws.

## Distinguishing Characteristics

Office Assistants 1 perform entry-level clerical and office support work, including processing transactions and maintaining records in a variety of organizational settings. Any given assignment may encompass a broad or narrow range of activities. Office Assistant 1 is a non-supervisory class found at nearly all State agencies.

Office Assistants 2 either supervise two or more Office Assistants 1 or other lower-level staff; and/or directly perform the more difficult or complicated clerical processing and office support work for which substantive knowledge of the program area is required.

Office Assistants 3 are typically classified as second-level supervisors within a large clerical or office support operation and generally supervise two or more Office Assistants 2.

## Illustrative Duties

*Office Assistant 1*

*General Office Support*

- Answer questions from and provide information to various parties regarding agency activities, transactions, and procedures. Refer inquiries as necessary.
- Operate various communication systems such as telephones and computers; and keep records of such communications.
- Operate, and perform basic cleaning and maintenance on, office machines and equipment. Clear paper jams in copiers, scanners and printers; replace toner cartridges; and clean keyboards and screens.
- Schedule appointments and meetings using various office tools.
- Perform routine processing activities, including checking forms for completeness and accuracy.

### *Calculations*

- Maintain basic financial, accounting, and/or statistical records.
- Perform calculations and computations, primarily on computers and calculators, using known and standard formulas and methods.
- As needed and as directed, contact various internal and external parties to obtain information.
- Prepare, process, review, and record numerical transactions and records. This activity may include: processing bills and vouchers; reviewing or auditing calculations or statistics; or disbursing or receiving items of value such as cash or vouchers, including, for example, such tasks as calculating and collecting fees.

### *Keyboarding and Document Preparation*

- Type, proofread, review, and correct correspondence, documents, records, and other written material.
- Transcribe hand-written materials.
- Make appropriate corrections for format, accuracy, and validity.
- Assist in gathering or compiling data for reports, graphs, charts, tables, or other products.
- Create graphs, charts, or other visual aids to display data.
- May also prepare routine reports or assist others in the preparation of reports, following established guidelines.

### *Record-Keeping and Filing*

- Maintain, update, and correct records and files.
- Receive, screen, review, and verify documents, forms, applications, claims, and other documents for completeness, content, and accuracy.
- Establish new files by coding and numbering forms, creating folders, and compiling relevant material.

### *Stores and Mail*

- Receive, pick up, deliver, open, appropriately record, time stamp, sort, and distribute mail, e-mail, or other forms of correspondence or communication, or goods, materials, or stores.
- Maintain files, correspondence, documents, records, materials, and stores pursuant to guidelines.
- Maintain various listings for mail service purposes.
- Process outgoing mail by inserting letters into envelopes, sealing envelopes, and applying correct postage.
- May operate a motor vehicle to pick up and deliver mail.

### *Inventory*

- Receive, unload, unpack, sort, store, count, and distribute goods received, following established procedures.
- Advise supervisor upon receipt of damaged goods or incomplete or incorrect shipments.
- Issue and may deliver goods from stock according to procedure.
- May package goods for shipment.
- Take periodic physical inventory and maintain perpetual inventory records.
- Keep shelves and stock clean, neat, and in proper place.

### *Data Entry and Verification*

- Enter data and information into and retrieve data and information from computerized systems.
- Verify data previously transcribed or entered to detect errors.
- Perform various clerical or office assistance tasks such as scanning documents, and verifying accuracy of data from scanned documents.

### *Office Assistant 2*

Office Assistants 2 may perform any of the duties of Office Assistants 1, and typically supervise two or more lower-level staff.

Non-supervisory positions perform complicated clerical and office support activities that require substantive knowledge of the program and/or of the program's governing laws, rules, or regulations. Such laws, rules, or regulations may be subject to frequent change. Incumbents typically handle sensitive applications, requests, or inquiries in which management or executive staff may be contacted or interested. They process applications or requests that do not meet normal parameters and may require additional research and consultation with higher level staff. They also perform activities that may require coordination with internal or external parties.

Duties of non-supervisory Office Assistants 2 may include the following.

- Design clerical processing procedures.

- Gather, compile, and prepare data from manual or automated files and other sources for various reports, publications, records, or other external or internal communications.
- Respond to questions concerning the operation of the unit or program area.
- Write responses to correspondence.
- Resolve work problems.
- Review forms and applications and make appropriate determinations.
- Coordinate arrangements for meetings, courses, and other gatherings arrange for rooms, take attendance, and insure that appropriate materials and equipment are available.

Office Assistant 2 positions classified based on supervision perform oversight activities to ensure that subordinate staff has appropriate resources, is properly trained, and performs high quality work that meets all applicable standards. Supervisory responsibilities may involve performing the following tasks.

- Plan work and determine how it will be performed.
- Assign work to staff and assure necessary coverage for assignments and office.
- Provide subordinates with specific instructions concerning the preparation of documents, processing of materials, and maintenance of records.
- Provide subordinates with standard formats for the preparation of documents and reports using available software packages.
- Provide training in the use of work equipment, and office and agency procedures.
- Evaluate the quality, quantity, and timeliness of work.
- Evaluate the performance of staff.
- Prepare performance evaluations.
- Schedule work hours and time off.

### *Office Assistant 3*

Office Assistants 3 are typically classified as second-level supervisors and are distinguished by supervision of two or more Office Assistants 2. They may perform any of the duties of lower-level Office Assistants, and are in charge of a clerical operation, or serve as the principal assistant to a higher level position responsible for such an operation. The supervisory activities performed by incumbents in this class are similar to those described above for Office Assistants 2, except that such tasks are performed over a larger and higher level staff.

### *Supervision*

As second-level supervisors, Office Assistants 3 typically supervise two or more Office Assistants 2, and perform the following tasks

- Assign work to staff; schedule work flow; establish work performance standards; review work performance and production; determine the nature of problems and take corrective action.

- Provide advice to and otherwise assist supervisors in planning, organizing, scheduling, and coordinating work operations and work procedures.
- Ensure that subordinate staff is trained adequately.
- May participate in the hiring process for subordinate staff, may prepare or assist in the preparation of the budget for the clerical operation, may maintain an active inventory for the clerical operation.
- May function as an overall manager over a clerical or office support operation.

### Minimum Qualifications

#### *Office Assistant 1*

None.

#### *Office Assistant 2*

Promotion: one year as an Office Assistant 1; or one year of permanent service in a clerical or keyboarding title allocated to Grade 5 or higher.

#### *Office Assistant 3*

Promotion: one year as an Office Assistant 2; or one year of permanent service in a clerical, keyboarding, or paraprofessional title allocated to Grade 7 or higher.

Attachment

**Note:** Classification Standards illustrate the nature, extent, and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all of the work that might be appropriately performed by a class. The minimum qualifications above are those which were required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum qualification requirements for appointment or examination.

Date: 10/2016

### **Parenthetics Attachment**

Office Assistants perform a wide range of duties. Office Assistant parenthetics are classified when the majority of a given position's duties and responsibilities emphasize a particular specialty.

#### *Office Assistant 1 & 2 (Keyboarding)*

Incumbents in these positions spend most of their work time performing keyboarding, data entry, chart compilation or arrangement, or various tasks involving

typing into computerized systems, as described primarily in the “Keyboarding and Document Preparation” section of the illustrative duties listed above.

Within this parenthesis, the second level is primarily distinguished by supervision of staff involved in keyboarding activities, and/or by the performance of the more complicated office support activities.

#### *Office Assistant 1 & 2 (Stores/Mail)*

Incumbents in these positions spend most of their work time performing activities related to mail receipt, mail distribution, storage, and stores keeping, primarily as described in the “Stores and Mail” and “Inventory” sections of the illustrative duties listed above.

Within this parenthesis, the second level is typically distinguished by supervisory responsibility for two or more lower level staff in a mail or storehouse operation, or by being the only stores-clerical employee within a correctional facility stores operation. Positions within this parenthesis may require the ability to routinely lift and/or carry heavy items and the ability to routinely reach, bend, stand, and walk for long periods of time.

#### *Office Assistant 2 (Customer Service)*

Incumbents in these positions spend most of their work time performing various communication tasks centered on customer service, and primarily, but not exclusively, deal with the general public. The work primarily is described in the “Customer Service” and “General Office Support” sections of the illustrative duties listed above. This typically is a non-supervisory class, but incumbents may supervise lower-level staff. Incumbents have constant communication with various individuals, in order to field questions, elicit and convey information, and resolve issues. Duties include the following.

- Respond, in various forms (verbal and written), to questions from the general public or others concerning the operation of the unit or program area and/or to explain and interpret agency rules, regulations, policies, or procedures.
- Interview clients to obtain detailed information to perform such tasks as completing forms, records, or documents. Determine the appropriate course of action based on that information.
- Based on established guidelines, standards, procedures, laws, rules, and regulations, evaluate documentation and, pursuant to that evaluation, issue permits, licenses, and other official permissions; and/or perform an initial assessment of applicant eligibility for program services or for the validity of claims.
- Explain reasons for agency determinations.
- Resolve complaints or problems, including settling complaints from difficult clients or customers.

- Contact various persons to obtain information to make proper determinations.
- Contact clients, applicants, and others to set up interviews, hearings, or similar interactions.
- Determine and collect fees.

*Office Assistant 2 & 3 (Calculations)*

Incumbents in these positions spend most of their work time performing mathematical operations, and/or clerical activities related to mathematical operations, in the service of agency or program functions, primarily as described in the “Calculations” section of the illustrative duties listed above. These activities may include creating spreadsheets, using calculators, and other means of performing calculations. These activities also may include entering information into, offering basic interpretations of information within, or retrieving information from various computer databases, including the Statewide Financial System and/or Microsoft Access or similar computer database software package. The positions’ duties may incorporate, but are not limited to, financial (including record-keeping, bookkeeping, and reconciliation activities), purchasing, or statistical functions.

Within this parenthesis, the second level typically supervises lower-level Office Assistants and/or may perform the more complicated calculations work. Incumbents at the second level are also expected to understand the activities of the program area within which they work in order to answer questions and explain or clarify procedures, and use independent judgment to make decisions and resolve problems. Typically employees in this parenthesis are responsible for a particular segment of a program where dealing with numbers and performing calculations is a critical aspect, such as accounts payable, purchasing, or payroll.

Duties may include the following.

- Review unit or departmental financial forms such as vouchers for conformance with approved spending.
- Maintain accounts for a major account clerical function (such as accounts receivable or payable) of an agency having a large accounts maintenance operation and a large volume of transactions or for all clerical accounts maintenance and processing activities for an agency, division, program, or small business office.
- Compile and prepare financial data for budgetary purposes.
- Reconcile accounts with bank statements and control ledgers and resolve discrepancies.
- Reconcile money received with value of receipts or tickets issued.
- Perform account clerical audits for programs in which there are a large number and variety of transactions, verifications, checks, and computations, and where the written procedures are changed frequently.

- Prepare payroll of a small agency or assist in the payroll of a large agency by preparing and processing payroll documents, computing and verifying salaries, and deductions.

The third level performs as the head of a clerical operation, typically functioning as second-level supervisor.

*Office Assistant 3 (Human Resources)*

Incumbents in these positions spend most of their work time performing activities related to human resources management. Their work may closely resemble those of other Office Assistants, and their tasks may encompass the broad range of Office Assistant tasks. Although positions in this class supervise, the size of the subordinate staff is not a classification factor.

Duties may include the following.

- Supervise subordinate staff in processing personnel transactions, employee benefit applications, and claims.
- Maintain and manage the maintenance of a variety of personnel office records, such as the personal history file, position control file, title folders, current subject files, health insurance application files, insurance claim files, correspondence files, and examination files.
- Conduct new employee orientation sessions.
- Provide employees and managers with information on and interpretations of the agency's personnel procedures and policies, the personnel transaction process, attendance rules, employee programs, or other aspects of the personnel system.
- Manage the processing of employee benefit claims.