

___ ASSISTANT SERIES OVERVIEW

CLERK

- ❑ **Repetitive**, routine and standardized procedures; Specific tasks with **detailed instructions**
- ❑ **Answers phones, transfers calls and takes messages.**
- ❑ **Copies, faxes, and files. Opens, sorts and distributes mail or correspondence, etc.**
- ❑ **Light typing. Maintains office supplies.**
- ❑ Not many Clerks on campus (usually students hired as Assistants to perform these types of tasks)

SR. CLERK/SECRETARY

- ❑ Follows a variety of detailed procedures or operations in related sequence or series.
- ❑ Enters data (ex: Excel); recording patient info into databases and files;
- ❑ Word processing, correspondence, forms and other materials (doesn't really question information)
- ❑ Prepares information packets, flyers, handouts and reports
- ❑ Schedules appointments, takes orders.

___ ASSISTANT I

- ❑ Follows basic procedures, which requires some knowledge of department and operating procedures.
- ❑ Types scientific papers, manuscripts and/or forms and other materials with ability to correct terms, and question information
- ❑ Answers phones, provides information, schedules appointments and makes appropriate referrals **using basic understanding of operations**
- ❑ **Compose correspondence; takes minutes at meetings. Travel arrangements.**

___ ASSISTANT II

- ❑ Interprets and makes decisions based on **established policies and procedures.**
- ❑ Determines procedural methods of work and coordinating phases of work with others
- ❑ Ex: Program Assistant II,
- ❑ Composes correspondence
- ❑ Performs Payroll accounting; inputs PPS entries
- ❑ Purchases departmental items by gathering necessary information, verifying and contacting vendors
- ❑ **Monitors and reconciles** department ledgers, funds and financial activities
- ❑ Coordinates domestic and foreign travel for executive/head of department
- ❑ **Gathers fiscal data** and uses spreadsheets to produce simple budgets

___ ASSISTANT III

- ❑ Responsible for all administrative aspects of a total program, service or department, including determination of procedures.
- ❑ **Analyzes** financial information to **prepare recommendations** to supervisor related to budget management.
- ❑ **Analyzes problems and recommends options** (i.e. resolving deficits in funds)
- ❑ Composes budget justifications and ensures accuracy and consistency
- ❑ Provides information or reports to managers to be used in resource determination and allocation, and makes recommendation to budgeting, staffing and space administration.
- ❑ Conducts fiscal closing activities.
- ❑ **Participate in long-range planning** for clerical/administrative needs of unit
- ❑ Makes operational decisions within policy.
- ❑ **Recommends policy or procedure** changes to improve business office practices.
- ❑ Prepares non-standard reports
- ❑ Interprets extramural fund policies and procedures.