

CLERICAL ASSISTANT TRAINEE, I, II

DEFINITION

Under general supervision, this class series performs a variety of routine to moderately difficult and specialized clerical duties including record maintenance, document preparation and review, answering questions and explaining routine procedures; performs related duties as required.

DISTINGUISHING CHARACTERISTICS

Clerical Assistant Trainee – is the entry and training level class of this series. Employees are required to have basic skills, but no previous clerical experience. Advancement to the full performance Clerical Assistant I is contingent upon successful completion of a predetermined training plan. Employees works under close supervision, performing repetitive and general clerical work of a routine nature such as copying, sorting, running errands, etc.

Clerical Assistant I – Employees perform a variety of routine clerical activities that do not require an in-depth knowledge of department procedures and/or an extensive skill level. Typical duties include receptionist duties, typing, simple word processing, data entry, basic record keeping and filing; answering procedural questions, and giving out factual information.

Clerical Assistant II – Employees perform a wide variety of general clerical duties including complex record maintenance, document processing and/or document production. Adequate performance at this level requires knowledge of departmental procedures and precedents, and the ability to choose among alternatives in solving problems.

REPRESENTATIVE DUTIES

*The duties listed below are examples of the work typically performed by employees in this class. An employee may not be assigned all duties listed and may be assigned duties which are not listed below. Marginal duties are those which are **least** likely to be essential functions for any single position in this class.*

1. Types a variety of documents in draft and final form; such as correspondence, standard forms, charts, proposals, specifications, and reports; types from written, recorded, printed sources and/or verbal instructions; proofreads materials for correct grammar, spelling and punctuation; composes routine memos and letters.
2. Prepares, validates, processes, and/or checks a variety of documents such as permit applications, client or project record, personnel/payroll records, requisitions, and invoices for completeness, accuracy and submission standards; maintains office supplies.
3. Receives work unit clients and answers calls; determines how incoming calls should be routed; directs people to appropriate offices or clients to proper information sources; answers routine questions; explains routine procedures, processes, or departmental activities; schedules appointments, training or examinations; *accepts payments for fees, fines or bills*; obtains routine factual information to create or update files; provides routine assistance in the completion of forms.

4. Sorts and/or files materials such as correspondence, contract documents, and client case information; maintains files; conducts systematic search for misplaced materials; maintains cross-reference files or indices; purges filing system.
5. Compiles routine reports and records by extracting and/or tabulating information from a variety of sources, such as files, correspondence, meeting notes, logs, previous reports, and/or verbal instruction.
6. Transfers professional and technical instructions to project or client files; researches reference materials to respond to client inquiries.
7. Operates a variety of office equipment, such as photocopiers, microfilm readers, and field dispatch equipment; may perform equipment/system maintenance checks; operates typewriter, data or word processing equipment to produce reports, correspondence, or forms; enter updates, and/or extracts stored information using such equipment.
8. May lead or provide general supervision to other clerical or program support personnel; may take and prepare simple minutes of unofficial meeting (e.g. department or public committees); may coordinate special library projects or be assigned specialized projects in support of departmental operations.
9. Receives, time stamps, routes and/or distribute materials; makes copies, collates or staples materials; folds, inserts and seals materials in envelopes; wraps, weighs and mails materials; *packs or unpacks books and materials; delivers/picks-up material or mail; runs errands as necessary.*
10. Assists with preparation and set up for meetings, scheduled events and calendared activities.

EMPLOYMENT STANDARDS

Education and/or Experience

Clerical Assistant Trainee- No experience or training required. Applicants must demonstrate an aptitude for learning clerical work as defined by the knowledge and abilities outlined below.

Clerical Assistant I- One year of clerical experience or any combination of training and experience that provides the desired knowledge and abilities.

Clerical Assistant II- Two years of increasing responsible clerical experience including frequent public contact, the use of journey level clerical skills or any combination of training and experience that provides the desired knowledge and abilities.

Knowledge of:

All Classes- office practices and procedures; office equipment operations; correct English usage including spelling, grammar and punctuation; public contact techniques.

Clerical Assistant II- record management; operation of word processing software applications; letter composition and report preparation.

Ability to:

All Classes- use correct English grammar, punctuation and spelling; understand and follow verbal and written instructions; alphabetize or numerically/chronologically sort materials; operate a variety of office equipment; receive and provide information both in person and over the phone; establish and maintain effective working relationships with supervisors, peers and the general public.

Clerical Assistant II- work independently; set up and maintain records and files; proofread; assemble data and compile report information; understand and apply rules, regulations, policy and procedures; perform accurate and rapid arithmetic calculations; meet the public with courtesy and tactfulness; communicate effectively both verbally and in writing; operate a variety of office equipment.

Skill in:

Clerical Assistant I/Trainee- typing/keyboarding operation at a rate of 40 wpm.

Clerical Assistant II- Typing/keyboarding operations at a rate of 45 wpm.

Special Requirements

Possession of or ability to obtain a valid California Driver's License may be required.

Physical Demands

Strength, dexterity, coordination and vision to use keyboard and video display terminal for long periods of time. Dexterity and coordination to handle files, and single piece of paper; occasional lifting of objects weighting up to 25 lbs. such as files, stacks of paper, reference and other materials. Moving from place to place within an office; some reaching from items above and below desk level.

WORKING CONDITIONS

Generally clean work environment with limited exposure to conditions such as dust, fumes, odors, or noise. Computer is used on a daily basis. Periodic contact with angry and upset individuals.

Date Adopted: August 6, 1996