

Iowa Department of Administrative Services – Human Resources Enterprise  
Classification Series Guidelines

## Clerical Series

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### Classes in the Series

#### Clerk Series

<u>Class Code</u>	<u>Class Title</u>
00010	Utility Office Worker
00011/90011	Clerk
00017	Clerk-Advanced
00018/90018	Clerk-Specialist

#### Typist Series

<u>Class Code</u>	<u>Class Title</u>
00012	Typist
00013	Typist-Advanced

### Series Concept

#### Clerk Series

Positions in this series perform clerical and technical support work in office procedures/processes and specialized department functions.

Basic duties of the Clerk Series:

- Maintains records.
- Screens, reviews, and verifies/approves documents/transactions.
- Searches and compiles information and data.
- Provides information, orally and in writing.
- Operates office machines (word processor, computer or terminal, dictaphone, adding machine, calculator, duplicating machine, etc.).
- May perform incidental typing, data entry, or keyboarding where speed is not essential.

#### Typist Series

- Performs skilled keyboarding (40 WPM).
- Performs clerical and technical support work in office procedures/processes as described for the Clerk Series.

### Exclusions

- 1) Positions that include full supervisory functions.
- 2) Positions performing:
  - a) clerical and technical work in maintaining general ledger, accounts receivable and accounts payable (Accounting Clerks);
  - b) para-professional or technical work in an established occupation (library science, accounting, human resources) at a level comparable to the Clerk Specialist (Library Associate, Accounting Technician, Human Resources Technical Assistant);
  - c) administrative support work to relieve a supervisor of his/her work within an established working relationship (Secretary);
  - d) primary work in greeting the public (Receptionist);
  - e) cashiering tasks as primary responsibility (Canteen Operator, Treasurer's Cashier);
  - f) assignments requiring the operation of a word processor machine 50% or more of the time (Word Processor 1, 2, 3).

### Definitions

#### Procedural clerical work:

- Concerned with assuring procedures are followed correctly and work is completed timely.
- Not concerned with the subject matter of transactions.
- Not responsible for determining the what or why of an activity or transaction.

Procedural clerical work is found primarily at the Clerk and Typist level.

#### Substantive clerical work:

- Concerned with determining if and how other steps in work processes are affected, and what can and should be done with these implications (the what and why of the transaction).
- Concerned with deciding the adequacy of the content (makes sense; fits situation; all options considered; needs met, etc.).

Substantive clerical work requires going beyond the direct task, question, or situation and is found primarily at the Clerk-Advanced, Typist-Advanced, and Clerk-Specialist levels.

### Class Distinctions

#### Utility Office Worker

- 1) Receives and delivers both incoming and outgoing mail.
- 2) Receives and delivers messages, documents and packages to offices and departments and assists in taking physical inventories.
- 3) Maintains files, reports and other materials and performs incidental typing.
- 4) Answers telephones, takes messages and routes information as directed and operates general office equipment.
- 5) Performs incidental custodial duties in office areas.

#### Clerk

- 1) Performs varied procedural clerical tasks.
- 2) Requires knowledge of procedures and guides.
- 3) Performs some tasks involving limited substantive clerical work.
- 4) Uses limited judgment and discretion in applying work instruction/guidelines to work performed.
- 5) Either clear-cut guidelines and/or a lead worker/supervisor are readily available.
- 6) May perform incidental typing, data entry, or keyboarding where speed is not essential.

#### Typist

- 1) Performs skilled keyboarding (40 WPM).
- 2) Performs clerical work as described for the Clerk class.

#### Clerk-Advanced

Differences between the Clerk and the Clerk-Advanced:

- 1) Assignments reflect substantive clerical work.
- 2) Judgment and discretion is required in using proper guide or precedent in planning clerical work.
- 3) Guidelines are complex, diverse, numerous, or require selection of the applicable process/procedure for the work task.

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### **Typist-Advanced**

- 1) Performs a preponderance of statistical typing tasks requiring extensive use of numbers, charts, and columnar typing in addition to skilled keyboarding (40 WPM); or
- 2) Performs clerical work described for the Clerk-Advanced class in addition to skilled keyboarding (40 WPM).

The classification of most Typist-Advanced positions is based on clerical work performed.

### **Clerk-Specialist**

Positions must function in one of the following three roles, to be classified as a Clerk-Specialist:

- 1) As a resident expert in a specialized agency functional area, requiring interpretations and adaptations of technical guidelines by the Clerk-Specialist as a sole or primary resource;  
or
- 2) As spokesperson, dealing primarily with the general public for the purpose of (1) review and authorization or rejection of requests/applications for certifications, claims and other monetary benefits or issue of license, permit, or similar instruments; and, (2) fulfilling legal documentation requirements for such transactions;  
or
- 3) As an office coordinator, in a large clerical operation or in a smaller field office or agency unit, whose job responsibilities meet at least two of the following criteria:
  - a) performs lead worker functions to maintain records and process paperwork for personnel, accounting and records management functions.
  - b) performs lead worker functions for one or more employees, such as, but not limited to--reassigning employees during peak workloads or emergencies, authorizing time off for employees, keeping employee work records.
  - c) oversees as lead worker functions, systems or processes in office support areas and provides assistance requiring the interpretation or adaptation of technical guidelines covering agency programs or services which affect these clerical processes.

The Clerk-Specialist differs from the Clerk-Advanced in the following:

- Functions in one of the three roles specified for classification as an Clerk-Specialist;
- Acts as spokesperson for the authority source in the interpretation of technical guidelines;
- Functions as a technical expert in resolving issues where there is a conflict in guidelines, difference of opinion, or an issue not specifically covered by the written guidelines.

*Effective date: 11/11 BR*