

PART I	HAWAII HEALTH SYSTEMS CORPORATION	1.004
	STATE OF HAWAII	1.006
		1.007
		1.008
	Class Specifications for the	1.009
	<u>CLERK SERIES</u>	
	SR-04; SR-06; SR-08; SR-10; SR-12	
	BU:03	

Series Definition:

This series includes all classes of positions which involve the performance, as well as the supervision of but not as a major portion of the working time, a variety of clerical duties of a general nature.

Basic clerical processes are involved in the work in the orderly processing and maintenance of the communications and records, supplies and materials, of an office or other entity. No single duty may be primary, or one or several may be, but in any case, the fundamental and predominant requirements are for the ability to follow instructions and learn applicable knowledge and skills on the job. Other abilities required include the ability to understand the meaning of words and to use them effectively, and the ability to perceive pertinent detail in verbal or tabular material. While some specialized techniques and/or manipulative skills evidenced in the work of positions in this series may serve as at least part of the bases for other clerical series, such techniques and skills are applied at a lower level of proficiency, and normally incidentally, infrequently or occasionally, or on a rotation basis.

Levels in this series are distinguished primarily on the basis of the character, scope and complexity of duties. Positions which perform a mixed level of duties will normally be evaluated on the basis of the highest level of work performed a substantial amount of time under general supervision and is significant for recruitment purposes. Other relevant factors are the nature of supervision exercised over the work, nature of available guidelines for performance of work, purpose and nature of person-to-person work contacts, nature and extent of supervisory control exercised over the work of other employees, effect and consequence of recommendations and decisions affecting work operations and methods, judgment and resourcefulness, pressure of work, knowledge and abilities required, and such other responsibilities as the responsibility for confidential matters, and the responsibility for the custody of usually modest sums of money or to initiate or approve its release or expenditure. The factors are interrelated and care must be exercised in the analysis and evaluation of the work.

CLERK I

1.004

Duties Summary:

Performs simple and repetitive clerical work in accordance with established procedures and as directed; and performs other duties as required.

Distinguishing Characteristics:

This is the entry-level class in the series and is distinguished on the basis of the performance of simple and repetitive clerical work tasks with very little variability. The clerical work performed typically involves a short cycle of various tasks and manual dexterity such as sorting and filing materials, opening and date stamping of mail, serving as walking messenger, mending torn pages and otherwise preparing materials for microfilming, etc. Assigned tasks are performed in accordance with established sequence and method, and are subject to continual review or regular check at frequent intervals although the frequency and extent of reviews may diminish on the more simple and regularly recurring assignments. While a position in this class typically is supervised by a higher level clerical position, supervision by a non-clerical position may also occur.

Examples of Duties:

Unwraps and/or unpacks various types of articles; opens envelopes, folders or similar containers by hand, using a letter opener, or using a letter opening machine; affixes tags, labels, postage stamps or other special forms to envelopes, packages, crates or other items by hand, stamping machine or stapler; sorts various forms, mail, or other items by hand into predetermined groups or sequences; fastens together various forms, records, documents, or other items using clips, pins or a stapling device; locates and removes specific items from systematic files; mends torn pages, removes paper clips and staples, etc.; wraps and/or packs various types of articles; addresses forms, envelopes, cards, folders, packages or other items by hand and weighs for postage; delivers, distributes, collects and/or procures various forms, records, mail or other items on foot, or using a hand truck, bicycle or other motorless conveyance; counts various items and performs simple computations; keeps count of documents handled and records count; calls out or reads aloud items, names, numbers or other data listed on special forms or assembled in classified or unclassified groups or lots; answers telephone; uses an automatic copier to make copies of letters and other materials; may perform simple and repetitive typing in posting to forms and labels.

Knowledge and Abilities Required:

Knowledge of: Arithmetic.

Ability to: Read and understand simple instructions and other similar information; convey simple information orally and in writing; learn various names and locations of people and offices; learn and perform simple and repetitive clerical and related manual work tasks; match names and numbers accurately; learn to operate various office appliances such as stamping, postage, stapling and similar machines.

CLERK II

1.006

Duties Summary:

Performs moderately complex clerical work and/or supervises and participates in performing simple and repetitive clerical work; and performs other duties as required.

Distinguishing Characteristics:

This is the intermediate level class in the series and is distinguished on the basis of the performance of various clerical duties in carrying out on a regular or rotational basis standard clerical routines characterized by some degree of variableness and possible regular and recurring contact with the public. Clerical routines include the maintenance of assigned files, records or work areas; the preparation of various simple reports; conduct of physical inventory for various offices or operations annually or more often, and the making of duplicate copies of typewritten materials by means of one or more duplicating machines. A position in this class may also be one which operates an automobile or similar motorized conveyance as a substantial work assignment in the performance of messenger duties.

A position in this class typically performs a number of duties, with attendant responsibility for completion or maintenance of the work activity. Work proceeds routinely on tasks following standard practice and instructions, but questionable matters are referred to the supervisor or other higher-level employee. While a position in this class typically is supervised by a higher-level clerical position, supervision by a non-clerical position may also occur.

Examples of Duties:

Locates files from various sources, and attaches reports, correspondence and other materials; assembles various forms, records, or other items into specific groups or sequences; places long distance telephone calls; makes count of various items and

completes totals and other summaries; prepares simple reports; copies desired data from one form or record into the proper place on another form or record by longhand; assists the public in locating/retrieving specific files, books or other materials in accordance with an established filing system; delivers, distributes, collects and/or procures various forms, records, mail or other items using an automobile, van or other similar motor-driven conveyance; transmits remittances with bills or other documents; makes routine entries in record books or on special or standard forms by longhand; prepares routine lists of specific items, numerical and/or verbal, according to designated system by longhand; places various forms, records, correspondence or other material in proper positions in systematic file; records on special forms or records all items of particular type(s) or classification(s) by longhand; codes various data for key punching; makes phone calls to obtain specific data; may sort punched cards into predetermined groups using a sorting stylus; makes simple calculations such as addition or subtraction with or without using a machine; maintains assigned shelves with appropriate stock, labeling, assisting others in locating items, reporting re-ordering needs, etc.; receives merchandise, materials, forms, mail or other items which are being delivered or returned for replacement or other purpose; counts cash receipts and compares with sales slips, and reports discrepancies; makes duplicate copies of typed or handwritten material using a mimeograph, hectograph, ditto machine, compo-type, dupligraph, multigraph, multilith, or similar type of duplicating machine; makes out various routine forms such as checks, receipts, form letter addresses, or other items, according to standard operating procedures by longhand; gives out various materials, forms or other items upon request of clients or other individuals; issues special forms or specific items upon request, or upon presentation of receipt, money, proper forms, or identification, by hand or using a ticket-dispensing or similar machine; may make duplicate copies of punched tabulating cards, using a key-punch duplicating machine; may sort punched cards into predetermined groups using a sorting machine, following a prescribed procedure; makes routine entries in record books or on special or standard forms using a typewriter or other type of office machine; compiles lists of numerical, verbal or other descriptive data; makes proper connections for incoming, outgoing or inter-office telephone calls, operating a cordless telephone switchboard or a telephone switchboard equipped with jacks and slots; may supervise clerical subordinates and others and participate in the performance of simple and repetitive clerical work on a regular and continuing basis.

Knowledge and Abilities Required:

Knowledge of: Arithmetic; spelling; filing and other general office work.

Ability to: Read and understand detailed but uninvolved instructions and other similar written materials; carry out procedures in established clerical work systems; convey routine information orally and in writing; operate various common office appliances and learn to operate other equipment such as duplicating machines; observe differences in copy and proofread words and numbers quickly and accurately; deal with others in a

tactful and polite manner; for some positions, operate an automobile, and/or supervise the work of others.

CLERK III

1.007

Duties Summary:

Performs complex clerical work and/or supervises and participates in performing moderately complex clerical work; and performs other duties as required.

Distinguishing Characteristics:

This is the journeyman-level class in the series and is distinguished on the basis of responsibility for performing a variety of complex clerical work and/or in carrying out the varied clerical work of a unit dealing continually with the public, such as in receiving and processing applications, licenses, registrations, or other materials. A position in this class may also be responsible for providing all clerical support services for a small office. Assigned work is performed independently, and an employee typically plans and arranges his or her own work schedule but carries out the work in accordance with established procedures and standard practices. Referral is made to the supervisor only when there is serious doubt as to procedures in unusual situations.

A position in this class may work regularly with information which is of a restricted nature such as health or social welfare case records, medical or other test results, and school grades. There is regular contact with other programs in a department, the general public, and others in obtaining or furnishing information or reports, which require tact to avoid misunderstanding in contacts where improper handling could affect results; however, primary responsibility for harmonious relationships is normally assumed by the immediate supervisor.

Examples of Duties:

Determines need for and/or makes routine orders for necessary supplies, materials, or other items; checks numerical or verbal data on forms, records or other items against a master form, or other standard, for inconsistencies, errors, or omissions; sets up files and/or codes, indexes, tabs or otherwise prepares classified material for filing or identification using standard or accepted systems; makes out various routine forms such as checks, receipts, invoices, form letter addresses, or other items, according to standard operating procedures using some type of office machine; may punch and record desired numerical and/or verbal data on proper forms or cards, using an alpha-numeric type key punch machine or an alphabetical printing-punch machine; prepares consolidated worksheets and summary totals; prepares routine, essentially numerical

data reports based on information at hand following standard operating procedures; makes arrangements for reservations, purchase of airline tickets, equipment maintenance, telephone service, or other similar matters; performs ordinary calculations requiring more than one step, such as multiplication or division, without using a machine or requiring the use of more than one set or group of keys on a calculating machine; receives and/or pays out cash, making proper change if necessary with or without using a machine such as a cash register; tabulates cash received and makes deposit slips; receives orders, requests, instructions or information, personally or by telephone, and makes follow-up with other government or private agencies on requests for information, etc.; notifies or reminds certain individuals or offices of meetings, schedules dates or specific duties or occurrences; may check and verify the accuracy of data punched on tabulating cards using a checking machine or a keyboard-type verifying machine; keeps a running balance of specific items, entries or amounts, with or without using a machine; checks actual quantity, quality, condition, value, or type of items against a master form or standard, verifying the accuracy of the forms and/or correctness of the item; balances specific items, entries, or amounts periodically in accordance with established groupings and categories, with or without using a machine; searches indexes, manuals, files, records or other sources for desired or missing information on specific subjects; classifies informational material, correspondence, special forms, records, orders, merchandise, or other items, following standard or accepted methods of systematized arrangement; corrects or marks errors found in figures, calculations, or record book data, by hand or using some type of office machine; anticipates needs of supervisor or others serviced and gathers records, letters or other specific items of information that might be wanted; assists applicants, clients, or other individuals in filling out special forms; reads incoming correspondence, determining disposition and/or destination; may on occasion take general notes and/or minutes at meetings or conferences by longhand; selects and/or gathers specific data, information, or desired items, according to standard operating procedures, or upon request; arranges interviews, appointments, or other meetings, by consulting a list, time schedule, or other record, or by contacting, directly or indirectly, any or all of the persons concerned; answers questions and gives requested direction or other standard information directly or by telephone; composes routine, non-technical correspondence or memoranda, following standard operating procedures; checks standard forms and/or correspondence for inaccuracies of spelling, punctuation, grammar, spacing, neatness or general appearance; may make up tables, graphs, charts or diagrams, based on data supplied from other sources using drawing, lettering or other instruments; compiles numerical or statistical data for tables, charts, rate schedules, or other uses with or without using a machine; makes out routine schedules of work, production, appointments, arrivals, departures or other matters; traces or follows-up on various forms, records, orders, materials or other items; obtains necessary or desired information, authorizations, approvals, signatures or other data from clients, applicants, superiors or other individuals; makes routine entries to records and standard forms using a typewriter, and may perform other simple typing; checks items to make certain that correct procedures are followed; may supervise clerical subordinates and others in

the performance of moderately complex clerical work on a regular and continuing basis.

Knowledge and Abilities Required:

Knowledge of: Business English; spelling; arithmetic; the operation and operational maintenance of common office appliances and equipment including office duplicating and copying machines; and office practices and procedures.

Ability to: Carry out a variety of standard office clerical routines; perform clerical assignments requiring uniform mental attention; learn and apply pertinent statutory provisions, rules, regulations, policies and procedures; learn and apply a variety of instructions furnished in written, oral, diagrammatic or schedule form; operate and maintain various common office appliances, which may include duplicating and simple electronic data processing equipment; prepare simple narrative and numerical reports; perform arithmetic operations quickly and accurately; speak and write simply and directly, and deal tactfully with others; for some positions, operate an automobile, and/or supervise the work of others.

CLERK IV

1.008

Duties Summary:

Performs highly complex clerical work and/or supervises and participates in performing complex clerical work; and performs other duties as required.

Distinguishing Characteristics:

This is the senior-level class in the series and is distinguished on the basis of responsibility for performing a wide range of clerical functions where some originating and planning of work are called for. Decisions are required because problems are often not covered by standard instructions or established techniques, systems or procedures. There is also frequent requirement for intense work activity.

A position in this class works regularly with some information which is restricted to specified persons, which may include information on planned changes in internal operations and policies, and contemplated personnel actions. There is regular contact with others within and outside the department in which tact is required, and the employee assumes responsibility for harmonious relationships.

Examples of Duties:

Consults or studies specific books, manuals, catalogs, or other sources in order to

obtain desired information; makes assignments of facilities, vehicles, equipment or similar items to provide for efficient and optimal use; performs numerous types of computations, such as discount, interest, ratio and percentage, which may include relatively complicated calculations involving roots, powers, formulae or specific sequences of action with or without using a machine; allocates debits, credits, costs, charges or other similar bookkeeping items of operational procedures to correct accounts or classifications; explains details of services, methods or policies; reviews the work of others, calling attention to the use of incorrect procedures or methods and to correct entries or results; approves or recommends rejection of applications, requests, claims or other items following operational policies or rules of action; composes correspondence requiring specific knowledge of methods, procedures, policies, statutes, rules and regulations, or other information; may supervise clerical subordinates and others in the performance of complex clerical work on a regular and continuing basis.

Knowledge and Abilities Required:

Knowledge of: Business English; spelling; arithmetic; the operation and operational maintenance of various office appliances and equipment, including office duplicating and copying machines; office practices and procedures.

Ability to: Plan and carry out a wide range of clerical functions, including various highly complex assignments; maintain an effective work pace under periodic deadlines; learn and apply pertinent statutory provisions, rules, regulations, policies and procedures; read and understand manuals and other detailed books of instruction; write routine business letters, summaries and reports using prescribed format and conforming to all rules of grammar and style; speak simply and directly, including occasionally speaking to groups as well as individuals; deal tactfully with others; for some positions, operate an automobile and/or supervise the work of others.

CLERK V

1.009

Duties Summary:

Supervises and participates in performing highly complex clerical work; and performs other duties as required.

Distinguishing Characteristics:

This is the working-supervisor class over senior-level work and is distinguished on the basis of responsibility for a wide range of clerical functions where work is carried out primarily in relation to general policies and objectives, and referral to the supervisor is

normally made only when clarification or interpretation of policy is required. Work procedures and performance standards are largely established, but there is a regular occurrence of unusual and difficult work where only general operating methods are applicable. There is also a frequent requirement for intense work activity in order to complete a large volume of work within a limited period of time because of frequent unforeseeable requirements and deadlines. A position in this class supervises others in the performance of highly complex clerical work and performs such work as well. Supervision does not normally involve maintaining a close check over the specific details of subordinates' work but out-of-the-ordinary phases of work are subject to specific direction and review.

A position in this class works regularly with some information which is restricted to specified persons, including information on planned changes in internal operations and policies, and contemplated personnel actions. There is regular contact with others within and outside the department in which tact is required and the employee assumes responsibility for harmonious relationships.

Examples of Duties:

Prepares or compiles financial, statistical or numerical statements and accompanying descriptive reports; consults or studies specific books, manuals, catalogs or other sources in order to obtain desired information; prepares reports requiring compilation from various sources of information, and systematic organization and presentation; supervises and performs numerous types of computations, such as discount, interest, ratio and percentage, which may include relatively complicated calculations; prepares summaries of activities, reports, or other data; supervises and performs the allocation of debits, credits, costs, charges or other similar bookkeeping items of operational procedures to correct accounts or classifications; determines various expenditures, purchases or other specific courses of action, basing decisions on rules of action, established policy, or executive request; makes estimates of operational procedures, needs or requirements such as operating budgets, materials or space needed, or numbers of items for clerical and administrative operations; explains details of services, methods or policies; drafts operational guides, forms and other materials, and correspondence, requiring specific knowledge of methods, procedures, policies, statutes, rules and regulations, and other information; organizes and assigns the work of subordinates, and evaluates work performance.

Knowledge and Abilities Required:

Knowledge of: Business English; spelling; arithmetic; the operation and operational maintenance of various office appliances and equipment; office practices and procedures; principles and practices of supervision.

Ability to: Plan and carry out a wide range of clerical functions, including various highly complex assignments; organize, assign, direct and review the work of others; maintain an effective work organization and pace under frequent deadlines; learn and apply pertinent statutory provisions, rules, regulations, policies and procedures; read and understand manuals and other detailed books of instruction; write business letters, summaries and reports requiring some judgment as to appropriate format and conforming to all rules of grammar and style; speak simply and directly to individuals and groups, and deal tactfully with others; for some positions, operate an automobile.

This series replaces the following classes: Clerk I (1.005), Clerk II (1.010), and Clerk III (1.015) which were approved on October 31, 1956.

This class is adopted from the State of Hawaii, relative to the transfer of classification and compensation jurisdiction to the Hawaii Health Systems Corporation, effective July 1, 1998, pursuant to Act 262, Session Laws of Hawaii, 1996.

APPROVED: _____
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