

A CATALOG OF MAJOR JOB RESPONSIBILITIES

**FOR USE IN THE
JOB PERFORMANCE PLANNING AND EVALUATION PROGRAM**

**This catalog is specifically designed for classifications previously identified
as using the 2E Specialized Form.**

**(See the next page for a listing of classifications previously associated with
the specialized form identified above.)**

To be used for developing Job Performance Plans

September, 2008

Special Form 2E

These Major Job Responsibilities and Descriptions of Exceptional Performance were derived from the specialized 2E Form and may be useful for the following classifications:

- Account Clerk
- Administrative Secretary
- Clerk 1
- Clerk 2
- Clerk 3
- Eligibility Clerk
- Executive Secretary 1
- Executive Secretary 2
- Secretary
- Tax Information Assistant
- Taxpayer Services Technician
- Telephone Operator 1
- Telephone Operator 2
- Title and Registration Examining Clerk Supervisor 1
- Title and Registration Examining Clerk 1
- Title and Registration Examining Clerk 2
- Title and Registration Information Assistant
- Word Processing Operator 1
- Word Processing Operator 2

GENERAL JOB PERFORMANCE AREAS

- 9401. PREPARATION AND/OR PROOFREADING OF TYPED MATERIALS
- 9402. RECEIVING AND ROUTING VISITORS
- 9403. ANSWERING TELEPHONES AND PLACING CALLS
- 9404. FILING AND FILE RETRIEVAL
- 9405. USE OF OFFICE MACHINES AND EQUIPMENT
- 9406. SCHEDULING AND PREPARING APPOINTMENTS/MEETINGS FOR APPROPRIATE STAFF
- 9407. COLLECTING AND DISTRIBUTING MATERIALS, MAIL, AND INFORMATION
- 9408. ADHERING TO WORK REQUIREMENTS AND REGULATIONS
- 9409. CONTRIBUTING TO THE EFFECTIVENESS OF THE WORK UNIT
- 9410. KEEPING LEAVE AND TIME REPORTS
- 9411. MONITORING AND ORDERING OFFICE SUPPLIES OR EQUIPMENT
- 9412. FILLING OUT, CODING, AND PROCESSING FORMS AND DOCUMENTS
- 9413. COMPILING AND PREPARING CORRESPONDENCE, REPORTS, AND ANALYSES
- 9414. PREPARING FOR AND RENDERING SERVICES TO THE PUBLIC
- 9415. PERFORMING CLERICAL ACCOUNTING FUNCTIONS
- 9416. MATHEMATICAL DOCUMENTATION FOR AUDIT PURPOSES
- 9417. LEADING OR SUPERVISING EMPLOYEES

9401. PREPARATION AND/OR PROOFREADING OF TYPED MATERIALS

- 9401A. Drafts are always keyed quickly and according to instructions.
- 9401B. Material is effectively edited for legibility, grammar, and punctuation errors before being keyed.
- 9401C. All spelling, punctuation, and grammatical errors are consistently identified and corrected in draft or final copies.
- 9401D. Corrections are routinely made on all copies.
- 9401E. Completed keying is free of errors.
- 9401F. Proper form, layout, and spacing are used in all typed materials.
- 9401G. Notes, minutes, and memoranda are accurately prepared as required
- 9401H. Typed/keyed material is submitted on or before deadline.
- 9401I. Always meets acceptable production standards.
- 9401J. Always returns original along with the modified material to the author.

9402. RECEIVING AND ROUTING VISITORS

- 9402A. Consistently treats visitors in a positive and pleasant manner.
- 9402B. Immediately notifies appropriate staff member of awaiting visitor.
- 9402C. Clear and accurate information is always provided to visitors.
- 9402D. Irate visitors are regularly handled calmly and without loss of temper.
- 9402E. Gives accurate directions to department, agency, and employee locations.
- 9402F. Requests are always processed quickly and accurately.

9403. ANSWERING TELEPHONES AND PLACING CALLS

- 9403A. Always answers telephone quickly, correctly, and in a friendly, courteous manner.
- 9403B. All calls are screened and transferred to appropriate person.
- 9403C. All telephone messages are taken accurately and completely, and quickly related to staff.
- 9403D. Effectively utilizes all telephone features.
- 9403E. Handles all difficult or unruly callers calmly and professionally.
- 9403F. Always promptly returns to calls on hold.
- 9403G. Consistently provides clear, accurate information to caller.

- 9403H. Never becomes confused or flustered when handling multiple calls.
- 9403I. Promptly and accurately places calls as instructed.
- 9403J. Maintains complete and accurate long distance telephone log.

9404 FILING AND FILE RETRIEVAL

- 9404A. All materials are placed in correct files.
- 9404B. Files are always kept current, and outdated material is eliminated.
- 9404C. All confidential/outdated material is maintained under security until destroyed in accordance with established procedures and schedules.
- 9404D. Material from controlled file room is requested within an appropriate timeframe.
- 9404E. Files are always labeled and cataloged or indexed to allow for easy retrieval by personnel.
- 9404F. Consistently completes filing and file retrieval quickly.
- 9404G. Only appropriate files are retrieved and given to person requesting the material.
- 9404H. Never allows unauthorized persons to access files.
- 9404I. Records are always sent for archival storage according to established procedures.

9405 USE OF OFFICE MACHINES AND EQUIPMENT

- 9405A. All machines and equipment are operated properly, efficiently, and according to established procedures.
- 9405B. Machines and equipment are constantly maintained according to the operator's manual.
- 9405C. Shares available office equipment with other staff for maximum work output.
- 9405D. Responsible staff or repair personnel are promptly notified whenever any office machinery breaks down.
- 9405E. Always keeps food, drink, and other potentially hazardous materials away from sensitive office equipment.
- 9405F. Effectively utilizes the capabilities of all equipment.
- 9405G. Follows all procedures properly for storing information in and retrieving information from office machines.
- 9405H. All data entry is completed in a timely and accurate manner.
- 9405I. Effectively assists in the training of new operators.
- 9405J. Provides effective operational assistance to all support staff.

9405K. Checks postage meter regularly to insure that an adequate amount of postage is maintained.

9406 **SCHEDULING AND PREPARING APPOINTMENTS/MEETINGS FOR APPROPRIATE STAFF**

9406A. Dates and times of meetings are never set up in conflict with previously made appointments.

9406B. always reserves appropriate meeting room.

9406C. All attending parties are informed of the date, time, location, and purposes of all meetings.

9406D. Staff are consistently reminded of their appointments.

9406E. Appropriate materials are collected, prepared, and assembled for staff prior to meetings.

9407 **COLLECTING AND DISTRIBUTING MATERIALS, MAIL, AND INFORMATION**

9407A. Collects, dates, logs, sorts, and distributes material to the appropriate persons in a timely manner.

9407B. Always insures that outgoing correspondence/material is correctly documented, addressed, and has all necessary attachments.

9407C. Reference correspondence is consistently attached to incoming material.

9407D. Reviews and highlights all incoming correspondence to help quickly focus attention on key points.

9407E. Maintains a current directory of names and addresses.

9407F. Erroneously delivered mail is always readdressed and immediately sent out.

9408 **ADHERING TO WORK REQUIREMENTS AND REGULATIONS**

9408A. Always arrives at work station and is ready to begin work at the scheduled time.

9408B. Works overtime when required.

9408C. Always notifies work unit promptly when ill.

9408D. If going to be late for work, employee notifies work unit as soon as possible.

9408E. Returns from all meals and breaks at the scheduled time.

9408F. Annual leave and other special absences are consistently scheduled in advance and are never taken without prior permission.

9408G. Clothing worn is appropriate for the work to be done.

- 9408H. Continues to work until scheduled quitting time.
- 9408I. Always uses work time effectively (e.g. avoids excessive talking, personal phone calls).
- 9408J. Proper procedures for maintaining confidentiality of information are always strictly followed.

9409 CONTRIBUTING TO THE EFFECTIVENESS OF THE WORK UNIT

- 9409A. Effectively carries out both oral and written instructions; immediately asks for clarification if unsure of what should be done.
- 9409B. Instruction and routing assignments are always carried out correctly without prompting; immediately notifies supervisor when problems arise.
- 9409C. Recognizes things that need to be done and routinely carries them out without prompting from supervisor.
- 9409D. Effectively covers the work for others during any breaks and other absences.
- 9409E. Works harmoniously with other staff on assignments; customarily contributes a fair share of work.
- 9409F. Always creates and maintains good interpersonal relationships; works out any differences that do occur without supervisor intervention.
- 9409G. Consistently promotes a positive work atmosphere; never maligns or undermines the work of others.
- 9409H. Always responds courteously to others when asked for assistance.
- 9409I. Constantly projects a positive image of the department through courteous, professional behavior.
- 9409J. Supports and clearly explains applicable laws, rules, and regulations as appropriate.
- 9409K. All complaints are quickly reviewed and properly handled.
- 9409L. Effectively serves as the acting supervisor in the supervisor's absence.

9410 KEEPING LEAVE AND TIME REPORTS

- 9410A. Ensures during each pay period, that all appropriate forms documenting leave and overtime exceptions are completed and signed by both employee and supervisor.
- 9410B. Ensures that all leave exclusions are accurately updated in the system with the appropriate hours and hour types.
- 9410C. All on-line error or warning messages are reviewed and appropriate actions are taken to ensure the accuracy of information entered.
- 9410D. All updates are entered in a timely manner to meet payroll deadlines.

9410E. Attendance and leave reports are reviewed and appropriate actions are taken as necessary to ensure accuracy.

9410F. Coordinates with appropriate work unit and agency staff to ensure accurate and timely processing of all attendance and leave records.

9411 MONITORING AND ORDERING OFFICE SUPPLIES OR EQUIPMENT

9411A. Supplies are checked on a regular schedule.

9411B. Routinely anticipates work unit's needs and keeps complete and accurate records of supplies needed, ordered, received, and dispensed.

9411C. Consistently reports office supply needs to appropriate person for reordering.

9411D. Always obtains proper authorization before ordering supplies and equipment.

9411E. Keeps a current, accurate list of all equipment issued to each employee, work area, and location.

9412 FILLING OUT, CODING, AND PROCESSING FORMS AND DOCUMENTS

9412A. All relevant data or materials needed for preparation of documents are retrieved from appropriate sources.

9412B. Clearly keys, writes, or codes all information correctly, completely, and accurately.

9412C. Mathematical calculations are always accurate.

9412D. Forms and documents are thoroughly checked/verified for missing or incorrect information, and corrections are made without delay.

9412E. Consistently processes forms and documents quickly.

9412F. All forms and documents are correctly distributed.

9412G. Keeps accurate records of forms and documents being processed.

9412H. Appropriate action is taken on all documents which are not in compliance with laws and regulations in force.

9412I. Compiles appropriate forms for services provided.

9413 COMPILING AND PREPARING CORRESPONDENCE, REPORTS, AND ANALYSES

9413A. Notes, minutes, and memoranda are accurately taken as required.

9413B. Materials are always logically organized.

- 9413C. All relevant data or materials needed for preparation of reports are retrieved from printouts, publications, files, or reports.
- 9413D. All reports are submitted by deadlines.
- 9413E. Graphs, charts, and maps are always prepared in the appropriate format.
- 9413F. Correspondence and reports consistently contain correct grammar and punctuation.
- 9413G. All correspondence and reports are clearly written and readable, and are at an appropriate level of understanding for the intended audience.
- 9413H. Copies of correspondence, reports, and analyses are made before the original is mailed or distributed, and are properly filed.

9414 PREPARING FOR AND RENDERING SERVICES TO THE PUBLIC

- 9414A. Verifies each patient/client's identity and eligibility for services.
- 9414B. Constantly provides services as appropriate.
- 9414C. Patient/client appointments are scheduled for an appropriate date and block of time and never conflict with previously scheduled appointments.
- 9414D. Required notifications are always sent out by deadlines, and are properly followed up.
- 9414E. When required, patients/clients are reminded of scheduled appointments by appropriate means.
- 9414F. Patients/clients are always notified of canceled appointments and are rescheduled.
- 9414G. Consistently follows proper procedures for collecting fees and writing receipts.
- 9414H. Always compiles appropriate forms for services provided.

9415 PERFORMING CLERICAL ACCOUNTING FUNCTIONS

- 9415A. Always bills for payments on a timely basis.
- 9415B. Constantly monitors printout for adjustments and corrections.
- 9415C. Accurately records all cash and/or credit transactions daily.
- 9415D. Information is consistently recorded or posted legibly, neatly, appropriately, and according to schedule.
- 9415E. Sums and totals are always accurate.
- 9415F. Consistently maintains current accounts receivable and disbursements journal.
- 9415G. Promptly makes corrections whenever errors are discovered.
- 9415H. Ledgers always balance.

- 9415I. Reviews petty cash reconciliations and immediately reports all discrepancies to supervisor.
- 9415J. Verifies statistical or monetary information with appropriate personnel and agencies within established timeframes.
- 9415K. Records are consistently easily accessible for audit purposes.
- 9415L. Follows all proper procedures for collecting fees, writing receipts, and depositing money.
- 9415M. Appropriate data is always accurately entered into the computer and verified.

9416 MATHEMATICAL DOCUMENTATION FOR AUDIT PURPOSES

- 9416A. Mathematical calculations are always accurate.
- 9416B. Any discrepancies are accurately identified, and appropriate follow-up action is immediately taken.
- 9416C. Audit process is fully documented in all files.
- 9416D. Work sheets and documents are always neat and legible.

9417 LEADING OR SUPERVISING EMPLOYEES

- 9417A. Regularly monitors work of subordinates and insures compliance all with departmental policies and procedures.
- 9417B. Criticism is always constructive, tactful, and given in an appropriate setting.
- 9417C. All decisions are timely, appropriate, and effectively followed up.
- 9417D. Always provides correct information on policies and procedures, or makes appropriate referrals.
- 9417E. Readily supports and effectively implements all changes in policies and procedures, even if contrary to personal opinion.
- 9417F. Properly trains personnel in departmental and institutional policies, procedures, and job duties.
- 9417G. Always sets positive examples for subordinates.
- 9417H. Accurately conveys information from other staff to line personnel.
- 9417I. Consistently and fairly enforces personnel policies and procedures; promotes positive employee relations.
- 9417J. Accurately assesses employee strengths and weaknesses and consistently sets realistic goals to achieve or maintain exceptional performance.
- 9417K. Effectively resolves all conflicts between employees before they interfere with job performance.