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.