

Title: Financial Assistant I

Qualifications: Classified/Associate Degree preferred

Reports To: Superintendent/designee

Job Duties/Responsibilities:

1. Supports general office functions as directed. Primary duties are related to district financial activities.
2. Proficient in database manipulation with diverse technology programs and platforms
3. Proficient in coordination and functions in district MUNIS operations
 - a. Data entry
 - b. Time and attendance
 - c. County Employees Retirement System (CERS)
 - d. Kentucky Teacher retirement System
 - e. Payroll
 - f. Sick and personal leave accruals
4. Assist Finance officer:
 - a. General fund reconciliation
 - b. Financial reports
 - c. Budget/amendments
 - d. CERS/KTRS reporting
 - e. Federal Tax reporting
 - f. County Tax reporting
 - g. Unemployment reporting
 - h. W-2 processing
 - i. MUNIS reports
5. Drafts financial, statistical, narrative, and/or other reports as requested.
6. Independently composes reports and correspondence containing decisions that supports all administrative decisions and directives.
7. Arranges, participates in, and implements, as directed, conferences and committee meetings.

8. Protects the interest of the district and employees in accordance with district policy and regulations governing human resources.
9. Organizes district files and records, answers telephone and directs calls to appropriate department or person, and handles calls if knowledgeable on the subject under discussion.
10. Direct visitors to the proper personnel, assist in answering the phone, and refer callers to appropriate persons.
11. Assists with district personnel processing
12. All other duties as assigned by the Superintendent.

Terms of Service:

Set by Bath County Board of Education.

Evaluations:

Superintendent/designee - Annual

Employee

Date

LOCAL DISTRICT CLASSIFICATION PLAN**CLASS TITLE: STAFF SUPPORT SECRETARY****BASIC FUNCTION:**

Perform a variety of responsible secretarial and clerical duties to assist a designated supervisor, including a Principal, Principal's secretary, Guidance Counselor or program supervisor; relieve supervisor of routine administrative details and general secretarial and clerical tasks.

REPRESENTATIVE DUTIES:

- Perform a variety of secretarial and clerical duties to assist a designated supervisor with routine administrative details and general clerical tasks; type, file and transcribe or compose letters, memoranda, documents, correspondence and bulletins as directed.
- Assist with office activities and communications related to assigned school or program activities; assure the compliance with District policies and time lines; take and relay messages and information.
- Type and prepare a variety of reports; maintain a variety of program, District, State records as required; requisition supplies, forms and maintenance work as needed, following established procedures.
- Prepare and maintain financial records and budgets; process or prepare budgetary documents, requisitions and other financial or purchasing documents.
- Greet visitors and answer phone calls; answer questions, provide information or direct individual to appropriate department or District employee; open, sort and distribute mail and other written communications.
- Schedule appointments and meetings with students, parents, teachers, vendors and the general public.
- Assist students with registration, orientation and student records; request records for new students and distribute records of withdrawn students to appropriate school.
- Perform research, compute and compile information and prepare statistical reports.
- Prepare and maintain records, reports, files and lists related to students, personnel, budgets, student records and attendance as required.
- Type from rough drafts or verbal instructions a variety of materials such as master schedules, letters, memorandums, requisitions, lists, bulletins, reports and statistical data; proofread and edit materials.
- Coordinate schedules and meetings; serve as receptionist and a contact and reference source for staff, students, parents and the public.
- Provide information over the phone or in personal contacts with parents, students or school personnel as appropriate; route calls to appropriate personnel as necessary.
- Operate a variety of office machines, including a microcomputer or computer terminal, typewriter, copiers and calculator.
- Perform related duties as assigned.

Staff Support Secretary - Continued**Page 2****KNOWLEDGE AND ABILITIES:**

January 1992

KNOWLEDGE OF:

- Modern office practices, procedures and equipment.
- Receptionist and telephone techniques and etiquette.
- Research techniques, practices and procedures.
- Financial and statistical record-keeping techniques.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Oral and written communication skills.
- Applicable sections of Kentucky Administrative Regulations and other applicable laws.
- Interpersonal skills using tact, patience and courtesy.
- Operation of office machines including computer equipment.

ABILITY TO:

- Perform a variety of secretarial and clerical duties to assist a Principal's secretary or Guidance Counselors with routine administrative details and general clerical tasks.
- Learn, interpret, apply and explain school and District policies, rules and objectives of assigned school or program.
- Understand and interpret rules and written directions and apply to specific situations.
- Compose correspondence independently.
- Perform duties effectively with many demands on time and constant interruptions.
- Type at an acceptable rate of speed.
- Establish and maintain effective working relationships with others.
- Meet schedules and time lines.
- Maintain records and prepare reports, including financial records.
- Work confidentially with discretion.
- Communicate effectively both orally and in writing.
- Understand and follow oral and written directions.
- Work independently with little direction.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and two years of increasingly responsible and varied secretarial and clerical experience.

Class Code:**7781****LOCAL DISTRICT CLASSIFICATION PLAN****CLASS TITLE: CLERICAL ASSISTANT III****BASIC FUNCTION:**

Perform a variety of responsible and technical clerical work in support of an assigned school or District program or function, including instructional programs, personnel, insurance, taxes, benefits, financial services or other specialized area; apply and explain procedures and policies of assigned program or department; provide work direction and guidance to student assistants and other clerical personnel as assigned.

DISTINGUISHING CHARACTERISTICS:**January 1992**

Clerical Assistant III incumbents perform specialized clerical duties or provide sole clerical support for an assigned function. Incumbents are required to exercise independent judgment and may be assigned lead duties. Incumbents in the Clerical Assistant II class perform a variety of responsible clerical support duties including typing, filing, recording and processing information, answering telephones and providing information to parents, students, faculty and others. Clerical Assistant I incumbents are assigned routine and repetitive general clerical duties requiring no previous experience.

REPRESENTATIVE DUTIES:

- Perform technical clerical duties related to assigned function such as compiling information from a variety of sources and preparing complex reports as required by District, County, State or federal regulations; communicate with other agencies or departments to provide or obtain a wide variety of information.
- Receive and screen phone calls and visitors; provide information and direct inquiries and visitors to the proper person or office; provide technical information concerning policies and procedures of assigned program or office according to established guidelines.
- Compose correspondence independently or from oral instructions; prepare letters, memos and forms, requesting, providing or verifying information; receive, screen and route mail.
- Prepare, format, type, proofread and duplicate a variety of items including proposals, contracts, reports, agendas, minutes and student records.
- Coordinate schedules and communicate with others regarding meetings, appointments, activities or announcements; schedule appointments, meetings, conferences and arrange interviews for supervisor and others.
- Operate computers and peripheral equipment to enter, revise and update information; generate records, reports, lists and summaries as needed; utilize various software as required by the position.
- Collect and account for fees and other monies received as assigned; monitor and maintain office or program budget according to established guidelines; type requisitions and process invoices according to established procedures.

Clerical Assistant III - Continued

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REPRESENTATIVE DUTIES - continued:

- Prepare and maintain detailed and complex logs, files and records; maintain inventory; order supplies and materials as assigned; maintain confidentiality of materials and information.
- Assure timely distribution and receipt of a variety of records and reports; request or provide information as necessary to assure completeness and accuracy.
- Train and provide work direction and guidance to student assistants and other clerical personnel as assigned.
- Operate a variety of office machines such as typewriter, computer terminal, calculator, copiers and other equipment as required.
- Receive and verify applications for services; recommend status of eligibility for prospective program participants as assigned; maintain records such as enrollment, attendance and absence verification.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Laws, regulations, policies and procedures of assigned program or department.
- Modern office practices, procedures and equipment.
- Basic financial and statistical accounting and record keeping.
- Record-keeping techniques, filing systems and information management.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Operation of office machines, including a microcomputer and computer terminal.
- Telephone techniques and etiquette.
- Interpersonal skills using tact, patience and courtesy.
- Oral and written communication skills.

ABILITY TO:

- Perform a variety of responsible and technical clerical work in support of an assigned District or school function or program.
- Provide work direction and guidance to student assistants and other clerical personnel as assigned.
- Read, interpret, apply and explain rules, regulations, policies and procedures.
- Add, subtract, multiply and divide quickly and accurately.
- Meet schedules and time lines.
- Communicate effectively both orally and in writing.
- Establish and maintain cooperative and effective working relationships with others.
- Perform duties effectively with many demands on time and constant interruptions.
- Plan and organize work.
- Maintain records and prepare reports.
- Type at 45 words net per minute from clear copy.
- Understand and follow oral and written directions.
- Operate a variety of office equipment such as typewriter, computer terminal, copiers and others as required by the position.

Clerical Assistant III - Continued

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EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and two years of increasingly responsible clerical experience involving the use of automated office equipment and software.

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: RECEPTIONIST

BASIC FUNCTION:

Operate a telephone switchboard at District or school-site office; perform receptionist, clerical and mail distribution duties; provide routine information to the public; perform receptionist duties, greeting and directing visitors.

REPRESENTATIVE DUTIES:

- Operate a switchboard; provide routine information and assistance; receive incoming calls and make necessary connections to school or District office or individual; take and transmit information and messages as requested.
- Perform a variety of clerical work as assigned including posting and maintaining records, typing and duplicating materials, receiving, sorting and distributing mail, preparing bulk and certified mail and maintaining postage records; assist other offices with a variety of clerical duties as directed.
- Greet, screen and direct visitors to appropriate departments; provide routine information to the public.
- Prepare, duplicate, assemble and distribute materials; maintain telephone personnel directory as assigned.
- File and type routine lists, records, reports and correspondence.
- Operate a variety of office equipment including typewriter, postage meter, calculator and copy machine.
- Distribute forms and applications; assist in completion and verify accuracy and completeness.
- Assure the switchboard is covered during working hours; train and provide work direction to substitutes and student workers.
- Contact police, security, fire and medical personnel as procedures require.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Operation of telephone switchboard.
- Telephone techniques and etiquette.
- Modern office practices, procedures and equipment.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Basic computer operation.
- Basic math.
- Postage regulations.

- Interpersonal skills using tact, patience and courtesy.
- Record-keeping techniques.

Receptionist - Continued

Page 2

ABILITY TO:

- Operate an assigned switchboard at District or school-site office.
- Perform receptionist, clerical and mail distribution duties.
- Provide information in a clear and understandable manner.
- Work independently with constant interruptions.
- Receive the public tactfully and courteously.
- Operate office equipment including typewriter, calculator, copier and postage machine.
- Type at an acceptable rate of speed.
- Understand and follow oral and written directions.
- Establish and maintain cooperative and effective working relationships with others.
- Maintain records and files.
- Work confidentially with discretion.
- Communicate effectively both orally and in writing.
- Basic math.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and one year of general clerical experience, including typing, public contact and the operation of a switchboard

Class Code:

7548

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: DATA ENTRY ASSISTANT

BASIC FUNCTION:

Operate computer terminals to enter data from a number of sources; operate other data processing equipment as directed; balance batch totals to assure input data is accurate and complete; maintain accurate and current files, records and data base files.

REPRESENTATIVE DUTIES:

- Operate on-line computer terminals and stand-alone microcomputers to enter data from a number of sources; prepare and review source documents to assure the accuracy and appropriateness of data to be entered.
- Balance batch totals to assure input data is accurate and complete.

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- Maintain accurate and current files, records and data base files; maintain a variety of records related to such areas as payroll, budgets, attendance, transportation or census information.
- Perform a variety of support functions, including answering the telephone, updating manuals and maintaining files and reports.
- Assist users as necessary in identifying and retrieving information.
- Assist in the operation of the tape drive, printer, scantron, decollator, burster and a variety of other ancillary data processing equipment.
- Provide for proper update of data processing manuals to assure appropriate documentation and user information.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Operation of data entry terminals and data processing ancillary equipment.
- Methods and techniques of data entry.
- Modern office practices, procedures and equipment including filing systems.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.

ABILITY TO:

- Operate an electronic computer terminal and computer software systems and generate reports.
- Perform general clerical and record-keeping duties of average difficulty.
- Type at an acceptable rate of speed.
- Operate standard office equipment.
- Understand and follow oral and written directions.
- Learn and apply District policies concerning registration and enrollment.

Data Entry Assistant - Continued

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EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and one year of experience in general clerical or data entry work.

Class Code:

7661

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: PERSONNEL ASSISTANT

BASIC FUNCTION:

Perform a wide variety of responsible personnel clerical duties in the areas of recruitment, substitute employees, orientation and worker's compensation; prepare and maintain personnel records, files and related reports; provide information and assistance in person and on the telephone to District personnel, staff and the public regarding personnel matters.

REPRESENTATIVE DUTIES:

- Perform a wide variety responsible personnel and clerical duties related to recruitment, placement of substitute employees, orientation and worker's compensation.
- Provide information and assistance in person or on the telephone to District personnel, staff and the public regarding a variety of personnel matters such as position vacancies, fringe benefits, and personnel regulations, policies and procedures.
- Receive and document messages and correspondence regarding teacher and classified employee absences; notify school or office of absences and respective substitutes.
- Arrange for teacher substitutes as necessary; maintain records regarding teacher substitutes.
- Distribute, receive, record and maintain files on job applications, transcripts, fingerprints, examinations, credentials and other information; review for completeness and compliance; schedule necessary interviews and appointments.
- Recruit and place advertisements for substitute and certificated personnel; place ads in appropriate media; obtain background information and review for compliance.
- Orient new employees and provide necessary information; assist in the enrollment in fringe benefits programs and in the completion of necessary documentation; process salary placement forms making changes as required.
- Process worker's compensation claims; assure compliance and completion of required documentation; provide information and explain regulations to District personnel.
- Prepare, type, update, maintain and process a variety of forms, reports, bulletins, records, schedules, lists and files according to established policies, procedures, regulations; verify and post information as necessary to assure completeness and accuracy.
- Compose and type letters, memoranda, lists and other materials according to established procedures.

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- Operate office equipment, such as a typewriter, computer terminal, printer, calculator, answering machine, copier and multi-line telephone.
- Order and maintain office supply inventories.
- Perform related duties as assigned.

Class Code:

7765

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: ADMINISTRATIVE SECRETARY II

BASIC FUNCTION:

Perform a wide variety of specialized and responsible secretarial and administrative support duties for a Deputy Superintendent or other high-level Cabinet administrator; organize and coordinate office activities and communications to assist the Deputy Superintendent with assigned functional areas of responsibility.

DISTINGUISHING CHARACTERISTICS:

Administrative Secretary II incumbents perform specialized and responsible secretarial and administrative support duties for a Deputy Superintendent or other high-level Cabinet administrator. Administrative Secretary I incumbents perform specialized and responsible secretarial and administrative support duties for an Assistant Superintendent, Executive Director or other high-level administrator.

REPRESENTATIVE DUTIES:

- Perform a wide variety of specialized and responsible duties independently in support of functions delegated to a Deputy Superintendent or other high-level Cabinet administrator; interpret and apply rules and regulations as appropriate; perform duties to assist with administrative detail as appropriate.
- Coordinate communication between the Deputy Superintendent and District administrators, personnel, students, educational institutions, vendors, other outside organizations and the public; obtain and provide information, coordinate activities and resolve problems.
- Research, review, check, correct and compile a variety of information; verify data for accuracy, completeness and compliance with established procedures; input and retrieve computerized data in computer systems as required.
- Prepare and maintain a variety of records, logs and files including information of a confidential nature; maintain confidentiality of information and records.
- Schedule meetings, conferences and appointments for the Deputy Superintendent; maintain the Deputy's calendar; arrange travel accommodations as necessary.
- Compile information and data for a variety of reports; organize, type and print reports and other written materials related to assigned office functions.
- Coordinate and compile Board Agenda materials.

- Respond to requests for information from students, staff and the general public regarding District programs, policies, procedures and regulations.
- Type a wide variety of materials such as correspondence, reports, contracts, forms, applications, memoranda and other documents.
- Take and transcribe dictation of minutes, letters and memoranda, including materials of a confidential nature as required by the position; prepare correspondence and memoranda independently or from oral instructions.

Administrative Secretary II - Continued

Page 2

REPRESENTATIVE DUTIES - continued:

- Operate a computer terminal and microcomputer to maintain records and generate reports, lists and other materials; utilize word processing and other software as required.
- Receive, process and route mail; order, issue and maintain department supplies, forms and equipment.
- Train and provide work direction to departmental clerical support staff as assigned; monitor office workflow and assure compliance with established time lines, procedures and standards of quality.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Modern office practices, procedures and equipment.
- Record keeping and report writing techniques.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- District organization, operations, policies and objectives.
- Oral and written communication skills.
- Applicable sections of Kentucky Administrative Regulations and other applicable laws.
- Interpersonal skills using tact, patience and courtesy.
- Telephone techniques and etiquette.
- Operation of a computer terminal and a variety of other office equipment including typewriter, calculator, copiers and dictation equipment.

ABILITY TO:

- Perform secretarial and administrative assistance duties.
- Read, interpret, apply and explain rules, regulations, policies and procedures.
- Type at an acceptable rate of speed.
- Take and transcribe dictation at an acceptable rate of speed.
- Work independently with little direction.
- Establish and maintain effective working relationships with others.
- Meet schedules and time lines.

- Prepare reports by gathering and organizing data from a variety of sources.
- Work confidentially with discretion.
- Analyze situations accurately and adopt an effective course of action.
- Communicate effectively both orally and in writing.
- Work efficiently with many interruptions.
- Operate a variety of office equipment including computer terminals, calculator, typewriter, copiers and dictation equipment.
- Make arrangements for meetings and conferences.
- Maintain a variety of files, records and logs.
- Plan and organize work.
- Provide work direction to others as assigned.

Administrative Secretary II - Continued

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EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and five years of responsible secretarial experience involving the use of word processing and record-keeping software.

LICENSES AND OTHER REQUIREMENTS:

Some positions in this classification require the ability to take and transcribe dictation.

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: SECRETARY II

BASIC FUNCTION:

Perform advanced-level secretarial duties for a Director-level administrator of a major District function requiring independent judgment and analysis; plan, organize and coordinate office activities and communications to relieve the administrator of routine administrative and clerical details.

DISTINGUISHING CHARACTERISTICS:

Secretary II incumbents report to a Director-level administrator with responsibilities for overall program administration of a large, complex District function and perform administrative assistance duties. Secretary I incumbents report to a District coordinator, specialist or other administrator having responsibility for a program of smaller size, complexity and impact and perform responsible administrative assistance duties.

REPRESENTATIVE DUTIES:

- Serve as secretary to a District-level Director or administrator of a large, complex program or function; plan, organize and coordinate activities to relieve the administrator of routine clerical details.
- Interview and screen callers and visitors, including students, teachers, administrators, parents, vendors and the public and provide information or direct to appropriate personnel; provide detailed and technical information concerning District policies, procedures and established regulations.
- Communicate with parents and District personnel on confidential or sensitive issues; screen incoming calls to gather and exchange information.
- Assure timely communications between office and District employees; make phone calls to receive and transmit information; type memos, bulletins, letters and notices; prepare Board agenda items and related materials as assigned; compose correspondence or prepare from rough draft.
- Coordinate enrollment of elementary and secondary school students; during summer months process and register students for fall classes; coordinate the inter-district transfer of students into and out of the District; coordinate registration of foreign students into District schools and assure proper immigration documents are completed.
- Type a variety of items including inter-office communications, requisitions, forms, letters, special projects, legal documents and other materials; establish, modify and maintain project and confidential filing systems.
- Train and provide work direction to other clerical personnel as assigned.
- Research and compile information and compute statistical data for federal, State and District reports and special projects as assigned.
- Schedule meetings, conferences and appointments for the Director; maintain Director's calendar; arrange for conference rooms and refreshments; arrange and schedule travel accommodations as necessary.

Secretary II - Continued

Page 2

REPRESENTATIVE DUTIES - continued:

- Assist in the maintenance of department budgets; enter data into computer to charge appropriate accounts; review invoices, requisitions and purchase orders for accuracy, completeness and compliance with department and District policies; inspect and verify accuracy of District financial reports with office records; research and resolve discrepancies as needed.
- Review or prepare a variety of materials and documents, including financial documents, invoices, inventory records and statistics; order supplies and materials and prepare purchase orders; assure adequate forms and supplies to support office operations.
- Attend a variety of meetings; prepare and send out notices of meetings; collect and compile information for meetings, projects and workshops; prepare and distribute minutes.

- Take and transcribe dictation of letters, reports, bulletins, meetings and memoranda as required; transcribe materials from dictation equipment as required; provide secretarial and clerical assistance to other staff as necessary.
- Maintain a variety of complex personnel records, time sheets, lists, files and records, including confidential materials.
- Compile data for budget; post and maintain budget and financial records of a variety of programs; monitor account balances and record expenditures.
- Receive, open and screen incoming mail and independently compose replies according to established procedures.
- Operate a variety of office equipment such as typewriter, computer terminal, FAX machine, copier and calculator.
- Coordinate communications between supervisor and other District staff and the public.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Modern office practices, procedures and equipment.
- Applicable sections of Kentucky Administrative Regulations and other applicable laws.
- District organization, operations, policies and objectives.
- Organization, rules, regulations and programs related to an assigned office or function.
- Operation of a computer terminal and data entry techniques.
- Software applications used by the District, including word processing and spreadsheets.
- Financial and statistical record-keeping techniques.
- Basic budget monitoring and control.
- Telephone techniques and etiquette.
- Financial and statistical record-keeping techniques.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

- Perform advanced-level secretarial duties requiring independent judgment and analysis.
- Plan, organize and coordinate office activities and communications to relieve the Director of routine administrative and clerical details.
- Work independently with little direction.

Secretary II - Continued

Page 3

ABILITY TO - continued:

- Type at an acceptable rate of speed.

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- Analyze situations accurately and adopt an effective course of action.
- Compose independently or from oral instructions letters, memos, bulletins or other material.
- Read, interpret, apply and explain rules, regulations, policies and procedures.
- Maintain records and prepare reports.
- Communicate effectively both orally and in writing.
- Meet schedules and time lines.
- Add, subtract, multiply and divide quickly and accurately.
- Establish and maintain cooperative and effective working relationships with others.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and three years of increasingly responsible secretarial and clerical experience.

LICENSES AND OTHER REQUIREMENTS:

Some positions in this class may be required to take and transcribe shorthand at an acceptable rate of speed.

Class Code:

7783

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: CLERICAL ASSISTANT I

BASIC FUNCTION:

Perform routine typing and general clerical activities in support of a school or District function, including instructional programs, school sites, personnel, mail services, food services and financial services; apply procedures and policies within clearly specified procedures.

DISTINGUISHING CHARACTERISTICS:

Clerical Assistant I incumbents are assigned routine and repetitive general clerical duties requiring no previous experience. Incumbents in the Clerical Assistant II class perform a variety of responsible clerical support duties including typing, filing, recording and processing information, answering telephones and providing information to parents, students, faculty and others. Clerical Assistant III incumbents perform specialized clerical duties or provide sole clerical support for an assigned function. Incumbents are required to exercise independent judgment and may be assigned lead duties.

REPRESENTATIVE DUTIES:

- Perform routine typing and general clerical activities in support of a school or District function, including instructional programs, school sites, personnel, mail services, food services and financial services.
- Type written materials such as letters, memoranda, bulletins or reports from straight copy or rough draft on a typewriter or computer terminal.
- Receive visitors; answer telephone and refer telephone calls and visitors to appropriate personnel; answer routine questions according to established guidelines; schedule meetings and appointments.
- Maintain and update records, inventories, index and cross reference files; maintain inventories of assigned materials, documents and equipment.
- Perform basic arithmetic calculations; receive and process various forms and documents, including financial and statistical documents; conduct general research duties as assigned.
- Receive, sort and distribute incoming and outgoing mail.
- Duplicate items; package and distribute completed correspondence and other materials.
- Assure the timely distribution and receipt of records, reports and bulletins as directed.
- Receive shipments of materials; inspect and verify for accuracy of quality, quantity and type of materials; notify supervisor of discrepancies or damage.
- Perform routine typing of reports from detailed copy; post records; proof completed typing assignments.
- Make telephone calls as directed; take and relay messages.
- Operate a variety of office equipment including typewriter, calculator, copier and other machines pertinent to the assignment.
- Provide work direction to student aides as assigned.
- Collect monies and maintain related financial records as required by the assignment.
- Perform related duties as assigned.

Clerical Assistant I - Continued

Page 2

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Modern office practices, procedures and equipment.
- Alphabetical, numerical and subject matter filing systems.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Telephone techniques and etiquette.
- Basic math.
- Basic operation of standard office machines, including computer terminals.
- Basic record-keeping techniques.

ABILITY TO:

- Perform clerical duties such as filing, duplications, typing and maintaining routine records.
- Operate a copier, typewriter and adding machine.
- Learn to operate a computer terminal and peripheral equipment.
- Learn polices and procedures of assigned program.
- Make arithmetic calculations quickly and accurately.
- Understand and follow oral and written directions.
- Meet schedules and time lines.
- Type at 35 words net per minute from clear copy.
- Work cooperatively with others.
- Communicate effectively both orally and in writing.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law.

Class Code:

7784

LOCAL DISTRICT CLASSIFICATION PLAN

CLASS TITLE: CLERK

BASIC FUNCTION:

Perform a variety of clerical duties involving filing and maintaining records or reports in support of a school or District function.

REPRESENTATIVE DUTIES:

- Operate various office equipment to perform duties, such as a copy machine.
- Prepare letters, memoranda, bulletins, reports, schedules, lists, forms or other materials as assigned.
- Perform other clerical duties for the assigned supervisor and other staff members as directed.
- Maintain a variety of logs, records and files related to assigned office.
- Distribute various forms and provide information and assistance to students, parents, the public and staff regarding their completion in an accurate and timely manner.
- Answer telephones; take and relay messages; greet students and the public and provide routine information; direct inquiries to the appropriate person or office; make phone calls to request, provide or verify information as directed.
- Maintain supply and material inventory of assigned area as required; order, receive and distribute materials, equipment and supplies as directed.
- Assure the timely duplication and distribution of a variety of records, reports and other materials as directed.

- Schedule appointments and meetings; maintain various schedules and calendars.
- Sort and distribute incoming U.S. and intra-District mail.
- Perform related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Modern office practices, procedures and equipment.
- Record-keeping techniques.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Telephone techniques and etiquette.
- Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

- Perform a variety of clerical duties involving filing and maintaining records or reports in support of a school or District function.
- Understand and follow oral and written directions.
- Operate office equipment.
- Meet schedules and time lines.
- Maintain records and prepare reports.
- Communicate effectively both orally and in writing.
- Work cooperatively with others.

Clerk - Continued

Page 2

ABILITY TO - continued:

- Complete work with many interruptions.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Personnel office methods, practices and procedures.
- District organization, operations, policies and objectives relating to personnel activities.
- Applicable sections of State Education Code and other applicable laws regarding assigned personnel activities.
- Record-keeping techniques.
- Operation of a computer terminal and other office equipment.
- Oral and written communication skills.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

- Perform responsible personnel clerical duties in the areas of teacher substitutes, recruitment, placement, and workers compensation.
- Maintain personnel records and files and prepare related reports.
- Learn and apply rules, regulations involved in assigned activities.
- Learn and apply applicable sections of State Education Code and other applicable laws.
- Maintain the security of confidential materials.
- Appropriately apply personnel rules and related procedures.
- Determine appropriate action within clearly defined guidelines.
- Communicate effectively both orally and in writing.
- Maintain records and prepare reports.
- Type at an acceptable rate of speed.
- Establish and maintain cooperative and effective working relationships with others.
- Meet schedules and time lines.
- Work independently with little direction.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: high school diploma, G.E.D. Certificate or demonstrated progress toward obtaining a G.E.D. as required by Kentucky law and one year responsible clerical experience.