

**APPROVED**

MASSACHUSETTS DEPARTMENT OF PERSONNEL ADMINISTRATION

**DEC 31 1987**

CLASSIFICATION SPECIFICATION

**Department of Personnel  
Administration**

I. CLERK SERIES:

Clerk I  
Clerk II  
Clerk III  
Clerk IV  
Clerk V  
Clerk VI

**APPROVED**

**DEC 31 1987**

Department of Personnel  
Administration

II. SUMMARY OF SERIES:

Incumbents of positions in this series maintain files and records; answer telephones; prepare and mail outgoing correspondence or parcels; prepare correspondence, forms, files, and reports for processing, storage, or forwarding; answer inquiries; operate standard office machines and equipment; and perform related work as required.

The basic purpose of this work is to provide clerical support for an assigned unit or agency.

III. ORGANIZATIONAL LEVELS:

Clerk I is the entry-level clerical job in this series.

Clerk II is the second-level clerical job in this series.

Clerk III is the third-level clerical job in this series or, based on assignment, may be the first-level supervisory job in this series.

Clerk IV is the first-level supervisory job in this series or, based on assignment, may be the second-level supervisory job in this series.

Clerk V is the second-level supervisory job in this series or, based on assignment, may be the third-level supervisory job in this series.

Clerk VI is the third-level supervisory job in this series or, based on assignment, may be the fourth-level supervisory job in this series.

IV. EXAMPLES OF DUTIES COMMON TO ALL LEVELS IN SERIES:

1. Files material such as correspondence, reports, applications, claim record cards, etc. in accordance with a prescribed classification system.
2. Answers telephone calls and provides routine information concerning agency services according to established procedures.
3. Prepares standardized forms such as routing slips, receipts, etc. according to detailed procedures.
4. Receives and distributes incoming mail, memoranda, packages, etc. to appropriate individuals within the assigned unit.

5. Retrieves records from files such as correspondence, applications, claim record cards, etc.
6. Locates and withdraws information from records by using electronic data display terminals, searching files, etc. in order to respond to inquiries or requests by supervisor.
7. Posts information to logs or records according to prescribed procedures.
8. Operates standard office machines and equipment requiring brief orientation for use such as photocopiers, mimeographs, other copying machines, file retrieval equipment, central console telephone systems, postage meters, microfilm or microfiche viewers or processors, calculators, adding machines, public address systems, paging devices, 2-way radios, binders, hand collators, perforators, folders, shredders, or similar equipment.
9. Reviews forms, lists, documents, correspondence and/or applications for accuracy and completeness.

Based on assignment, incumbents of positions at this level or higher may also:

1. Perform typing functions in which speed is not essential, such as typing forms, routine correspondence, envelopes, labels, index cards, etc.

V. DIFFERENCES BETWEEN LEVELS IN SERIES:

Clerk II:

Incumbents of positions at this level or higher also:

1. Maintain records according to established procedures in order to ensure accurate and complete information.
2. Answer inquiries relative to laws, rules, regulations, policies and procedures governing agency services.
3. Make calculations according to prescribed formulae for the purpose of processing documents such as invoices, payments, tax returns, etc.
4. Schedule or arrange for conferences, meetings, interviews, appointments, or similar activities by reserving required facilities, checking the availability of parties involved and notifying appropriate individuals of dates, times and locations to ensure the availability of facilities and attendance by appropriate individuals.
5. Prepare requisitions according to standard procedures in order to replenish supplies.
6. Notify appropriate parties, orally and in writing, of information such as meetings, conferences, court decisions, trial cancellations, patient arrivals and discharges, etc.

Based on assignment, incumbents of positions at this level or higher may also:

1. Issue licenses, registration plates, certificates of title, permits, or identification cards by checking applications for conformance with established guidelines, accepting fees, completing required forms and/or operating simple cameras and laminating devices to provide applicants with official documentation of licensure.

Clerk III:

Incumbents of positions at this level or higher may also:

1. Conduct on-the-job training of assigned employees concerning routine clerical procedures, agency policies, etc.
2. Compile statistical information to be included in reports of agency activities.
3. Proofread typed material for grammatical, punctuation and spelling errors and for proper format, accuracy and completeness.
4. Compose correspondence for routine letters such as requests for information, confirmation of meetings, etc.
5. Operate specialized office machines or equipment requiring training by the manufacturer prior to use.

Based on assignment, incumbents of positions at this level or higher may also:

1. Perform typing functions requiring the ability to produce 35 mailable words per minute, such as letters and memoranda.

Clerk IV:

Incumbents of positions at this level or higher also:

1. Explain provisions and contents of various documents or programs including effective rates, options, eligibility, benefits, etc. to employees and others.
2. Interview applicants for clerical positions and make recommendations to superiors.
3. Prepare and/or process personnel actions such as promotions, appointments, demotions, terminations, transfers and leaves of absence by recording such actions and completing forms for forwarding for approval.

Clerk V:

Incumbents of positions at this level or higher also:

1. Develop, revise and, with approval of supervisor, carry out work procedures, in cooperation with other units of the department to ensure the efficient and effective flow of work.

Clerk VI:Incumbents of positions at this level also:

1. Plan and organize the work of clerical staff by developing and revising work procedures, recommending changes to clerical policy and procedures to supervisors and coordinating unit activities with other units of the department.
2. Develop training programs for new employees regarding assigned activities.

VI. RELATIONSHIPS WITH OTHERS:

Major work contacts are with co-workers or with persons using agency services or requesting information.

VII. SUPERVISION RECEIVED:Clerk I:

Incumbents of positions at this level receive close supervision from clerks or other employees of higher grade who provide detailed instructions on all work activities and review performance through inspection for accuracy, completeness, neatness and compliance with instructions.

Clerk II:

Incumbents of positions at this level receive direct supervision from clerks or other employees of higher grade who provide instructions on work assignments and review performance through inspection and verbal reports for accuracy, completeness, neatness and compliance with instructions.

Clerk III:

Incumbents of positions at this level receive direct supervision from clerks or other employees of higher grade who provide instructions on procedures as required and review performance through conferences and reports for accuracy, completeness, neatness and compliance with standard procedures.

Clerk IV:

Incumbents of positions at this level receive general supervision from clerks or other employees of higher grade who provide procedural guidance and review performance through conferences and reports for effectiveness, accuracy and compliance with standard procedures.

Clerk V:

Incumbents of positions at this level receive general supervision from administrative or other employees of higher grade who provide guidance on policies and procedures and review performance through conferences and reports for effectiveness, accuracy and compliance with agency policies and procedures.

Clerk VI:

Incumbents of positions at this level receive general supervision from administrative or other employees of higher grade who provide guidance on policies and review performance through conferences and reports for effectiveness and compliance with agency policy and procedures.

VIII. SUPERVISION EXERCISED:Clerk I:

None.

Clerk II:

None.

Clerk III:

Incumbents of positions at this level may exercise direct supervision (i.e. not through an intermediate level supervisor) over, assign work to and review the performance of 1-5 clerical personnel.

Clerk IV:

Incumbents of positions at this level exercise direct supervision (i.e. not through an intermediate level supervisor) over, assign work to and review the performance of 1-5 clerical personnel and may exercise indirect supervision (i.e. through an intermediate level supervisor) over 6-15 clerical personnel.

Clerk V:

Incumbents of positions at this level exercise direct supervision (i.e. not through an intermediate level supervisor) over, assign work to and review the performance of 6-15 clerical personnel and exercise indirect supervision (i.e. through an intermediate level supervisor) over 6-25 personnel.

Clerk VI:

Incumbents of positions at this level exercise direct supervision (i.e. not through an intermediate level supervisor) over, assign work to and review the performance of 6-25 clerical personnel and exercise indirect supervision (i.e. through an intermediate level supervisor) over 6-25 personnel.

X. WORKING CONDITIONS:

Incumbents of positions in this series work in a typical office environment with no unusual working conditions; based on assignment, incumbents may work in offices at hospitals, prisons, or other institutions.

X. QUALIFICATIONS REQUIRED AT HIRE FOR ALL LEVELS IN SERIES:

1. Knowledge of the English language including spelling, word meaning and word usage.
2. Ability to understand and apply the laws, rules, policies and procedures governing assigned unit activities.
3. Ability to read, write, and comprehend the English language.
4. Ability to use proper grammar, punctuation and spelling.
5. Ability to follow written and oral instructions.
6. Ability to assemble items of information in accordance with established procedures.
7. Ability to work accurately with names, numbers, codes and/or symbols.
8. Ability to file material in accordance with standard filing procedures.
9. Ability to maintain accurate records.
10. Ability to communicate effectively in oral expression.
11. Ability to establish and maintain harmonious working relationships with others.
12. Ability to deal tactfully with others.

Based on assignment, the following additional qualification may be required at hire for Clerk I positions:

13. Ability to operate a typewriter.

Additional qualifications required at hire for Clerk II and higher positions:

1. Knowledge of the types and applications of standard office filing systems.
2. Knowledge of clerical office practices and procedures including office record keeping, office correspondence control, the types and uses of office equipment and supplies and business letter preparation.
3. Skill in operating general office machines and equipment such as photocopiers, mimeographs, other copying machines, file retrieval equipment, console (centrex) telephone systems, postage meters, microfilm or microfiche viewers or processors, calculators, other adding machines, public address systems, paging devices, 2-way radios, binders, hand collators, perforators, folders, electric staplers, shredders, or similar equipment.
4. Ability to explain the laws, rules, policies and procedures governing assigned unit activities.

5. Ability to perform arithmetical computations with speed and accuracy (addition, subtraction, multiplication and division).

Based on assignment, the following additional qualifications may be required at hire for Clerk II and higher positions:

1. Ability to operate specialized office machines or equipment such as electronic data display terminals.

Additional qualifications required at hire for Clerk III and higher positions:

1. Ability to give written and oral instructions in a precise, understandable manner.
2. Ability to determine the proper format and procedure for assembling items of information.

Based on assignment, the following additional qualifications may be required at hire for Clerk III positions:

1. Ability to supervise, including planning and assigning work according to the nature of the job to be accomplished, the capabilities of subordinates and available resources; controlling work through periodic reviews and/or evaluations; determining subordinates' training needs and providing or arranging for such training; motivating subordinates to work effectively; determining the need for disciplinary action and either recommending or initiating disciplinary action.
2. Ability to type 35 mailable words per minute.

Additional qualifications required at hire for Clerk IV and higher positions:

1. Ability to supervise, including planning and assigning work according to the nature of the job to be accomplished, the capabilities of subordinates and available resources; controlling work through periodic reviews and/or evaluations; determining subordinates' training needs and providing or arranging for such training; motivating subordinates to work effectively; determining the need for disciplinary action and either recommending or initiating disciplinary action.
2. Ability to communicate effectively in written expression.
3. Ability to exercise sound judgment.

Based on assignment, the following additional qualification may be required at hire for Clerk IV positions:

1. Knowledge of the principles, practices and techniques of supervision.
2. Ability to type 40 mailable words per minute.

Additional qualifications required at hire for Clerk V positions:

1. Ability to coordinate the efforts of others in accomplishing assigned work objectives.

2. Knowledge of the principles, practices and techniques of supervision.

XI. QUALIFICATIONS ACQUIRED ON JOB AT ALL LEVELS IN SERIES:

1. Knowledge of the laws, rules, policies and procedures governing assigned unit activities.
2. Knowledge of the types and uses of agency forms.
3. Knowledge of the proper telephone procedures for making and receiving agency calls.

Additional qualifications acquired on job in Clerk I positions:

1. Knowledge of the types and applications of standard office filing system.
2. Knowledge of clerical office practices and procedures including office record keeping, office correspondence control, the types and uses of office equipment and supplies and business letter preparation.
3. Skill in operating general office machines and equipment such as photocopiers, mimeographs, other copying machines, file retrieval equipment, central console telephone systems, postage meters, microfilm or microfiche viewers or processors, calculators, adding machines, public address systems, paging devices, 2-way radios, binders, hand collators, perforators, folders, electric staplers, shredders, or similar equipment.

Based on assignment, the following additional qualification may be acquired on job in Clerk III positions:

1. Knowledge of the principles, practices and techniques of supervision.

Based on assignment, the following additional qualification may be acquired on job in Clerk IV positions:

1. Knowledge of the principles, practices and techniques of supervision.

XII. MINIMUM ENTRANCE REQUIREMENTS:

Clerk I:

None.

Clerk II:

Applicants must have at least (A) one year of full-time, or equivalent part-time, experience in office work, or (B) any equivalent combination of the required experience and the substitutions below.

Substitutions:

- I. A diploma as evidence of graduation from the commercial or business course of a recognized high school or vocational/technical high school may be substituted for the required experience.\*

- II. A diploma as evidence of graduation from a course other than the commercial or business course of a recognized high school or vocational/technical high school or possession of a Massachusetts high school equivalency certificate may be substituted for a maximum of eight months of the required experience.\*
- III. A diploma for completion of a program in a recognized non-degree granting business or secretarial school above the high school level may be substituted for the required experience.\*
- IV. An Associate's or higher degree may be substituted for the required experience.\*

\*Education toward such a degree or diploma will be prorated on the basis of the proportion of the requirements actually completed.

#### Clerk III:

Applicants must have at least (A) two years of full-time, or equivalent part-time, experience in office work, or (B) any equivalent combination of the required experience and the substitutions below.

#### Substitutions:

- I. A diploma as evidence of graduation from the commercial or business course of a recognized high school or vocational/technical high school may be substituted for a maximum of one year of the required experience.\*
- II. A diploma as evidence of graduation from a course other than the commercial or business course of a recognized high school or vocational/technical high school or possession of a Massachusetts high school equivalency certificate may be substituted for a maximum of eight months of the required experience.\*
- III. A diploma for completion of a one-year, full-time, or equivalent part-time, program in a recognized, non-degree granting business or secretarial school above the high school level may be substituted for a maximum of one year of the required experience.\*
- IV. A diploma for completion of a two-year, full-time, or equivalent part-time, program in a recognized non-degree granting business or secretarial school above the high school level may be substituted for the required experience.\*

\*Education toward such a degree or diploma will be prorated on the basis of the proportion of the requirements actually completed.

#### Clerk IV:

Applicants must have at least (A) three years of full-time, or equivalent part-time, experience in office work, or (B) any equivalent combination of the required experience and the substitutions below.

Substitutions:

- I. A diploma as evidence of graduation from the commercial or business course of a recognized high school or vocational/technical high school may be substituted for a maximum of one year of the required experience.\*
- II. A diploma as evidence of graduation from a course other than the commercial or business course of a recognized high school or vocational/technical high school or possession of a Massachusetts high school equivalency certificate may be substituted for a maximum of eight months of the required experience.\*
- III. A diploma for completion of a one-year, full-time, or equivalent part-time program in a recognized, non-degree granting business or secretarial school above the high school level may be substituted for a maximum of one year of the required experience.\*
- IV. A diploma for completion of a two-year, full-time, or equivalent part-time, program in a recognized, non-degree granting business or secretarial school above the high school level may be substituted for a maximum of two years of the required experience.\*

\*Education toward such a degree or diploma will be prorated on the basis of the proportion of the requirements actually completed.

NOTE: Educational substitutions will only be permitted for a maximum of two years of the required experience.

Clerk V:

Applicants must have at least (A) four years of full-time, or equivalent part-time, experience in office work, of which (B) at least one year must have been in a supervisory or administrative capacity, or (C) any equivalent combination of the required experience and the substitutions below.

Substitutions:

- I. A diploma as evidence of graduation from the commercial or business course of a recognized high school or vocational/technical high school may be substituted for a maximum of one year of the required (A) experience.\*
- II. A diploma as evidence of graduation from a course other than the commercial or business course of a recognized high school or vocational/technical high school or possession of a Massachusetts high school equivalency certificate may be substituted for a maximum of eight months of the required (A) experience.\*
- III. A diploma for completion of a one-year, full-time, or equivalent part-time, program in a recognized, non-degree granting business or secretarial school above the high school level may be substituted for a maximum of one year of the required (A) experience.\*

- IV. A diploma for completion of a two-year, full-time, or equivalent part-time, program in a recognized, non-degree granting business or secretarial school above the high school level may be substituted for a maximum of two years of the required (A) experience.\*

\*Education toward such a degree or diploma will be prorated on the basis of the proportion of the requirements actually completed.

NOTE: Educational substitutions will only be permitted for a maximum of two years of the required (A) experience. No substitutions will be permitted for the required (B) experience.

Clerk VI:

Applicants must have at least (A) five years of full-time, or equivalent part-time, experience in office work, of which (B) at least two years must have been in a supervisory or administrative capacity, or (C) any equivalent combination of the required experience and the substitutions below.

Substitutions:

- I. A diploma as evidence of graduation from the commercial or business course of a recognized high school or vocational/technical high school may be substituted for a maximum of one year of the required (A) experience.\*
- II. A diploma as evidence of graduation from a course other than the commercial or business course of a recognized high school or vocational/technical high school or possession of a Massachusetts high school equivalency certificate may be substituted for a maximum of eight months of the required (A) experience.\*
- III. A diploma for completion of a one-year, full-time, or equivalent part-time, program in a recognized, non-degree granting business or secretarial school above the high school level may be substituted for a maximum of one year of the required (A) experience.\*
- IV. A diploma for completion of a two-year, full-time, or equivalent part-time, program in a recognized, non-degree granting business or secretarial school above the high school level may be substituted for a maximum of two years of the required (A) experience.\*

\*Education toward such a degree or diploma will be prorated on the basis of the proportion of the requirements actually completed.

NOTE: Educational substitutions will only be permitted for a maximum of two years of the required (A) experience. No substitutions will be permitted for the required (B) experience.

II. SPECIAL REQUIREMENTS:

None.

Occupational Group 15

Revised 11/87