STATE OF WISCONSIN
CLASSIFICATION SPECIFICIATION

OFFICE OPERATIONS ASSOCIATE

I.   INTRODUCTION

A.   Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future office support positions. This classification defines work activities that provide complex office support in major administrative functions and program areas. This classification specification is not intended to identify every duty that may be assigned to positions, but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions must be based on the "best fit" of the duties within the existing classification structure. The "best fit" is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B.   Inclusions

This classification encompasses office support positions that may be found in any work unit in any state agency, college, or campus. This type of complex office support exists in administrative services settings and in agency or campus-specific program settings as defined within this specification.

C.   Exclusions

Excluded from this classification are the following types of positions:

1.   Positions that meet the statutory definitions of supervisor and/or management in s. 111.81, (19) and (13), Wis. Stats., as interpreted and administered by the Wisconsin Employment Relations Commission.

2.   Positions that perform repetitive clerical support tasks for a majority of the time and are more appropriately classified as Clerical Assistant.

3.   Positions that perform confidential administrative duties as defined in s. 111.81(15), Wis. Stats., for a majority of the time that are more appropriately classified as Program Assistant-Confidential and Program Assistant Advanced-Confidential.

4.   Positions that, for a majority of the time (more than 50%), are responsible for general routine office support and are more appropriately classified as Office Associate.

5. Positions that perform paraprofessional support duties in agency/campus specific program areas for the majority of time and are more appropriately classified as Operations Program Associate.

6. Positions that perform complex office support for a student program or program area unique to higher education for the majority of time (more than 50%) and are more appropriately classified as University Services Associate 2.

7. Positions that perform paraprofessional administrative duties for a majority of the time with a broad scope of responsibilities and reporting relationships that are more appropriately classified as Academic Department Associate, Academic Department Specialist, Dean Assistant, Executive Staff Secretary, Executive Staff Assistant, or University Executive Staff Assistant.

8. Positions that perform work activities in a specific administrative or other functional area for a majority of the time and are more properly classified by a more specific classification such as Financial Specialist, Payroll & Benefits Specialist, Shipping and Mailing Clerk, etc.

9. All other positions that are more appropriately identified by other classification specifications.

D. Entrance Into This Classification

Employees enter positions within this classification by competition. Note: Competition is required for first time permanent assignment of leadworker duties.

E. Terminology Used in This Classification Specification

Administrative Services Settings: General business operations required of all agencies and campuses such as reception, human resources, budget and finance or payroll.

Close Supervision: Work is performed according to detailed instructions and supervision is available on short notice.

Consequence of error: The impacts of errors on people, resources, programs, and operations; the type of error typically made and how it is detected; who or what the error affects; and the extent of impact of the error.

Discretion: The freedom or authority to make decisions or choices. Factors to consider include control over the assignment and scheduling of work; the extent to which goals, methods and procedures and priorities are determined by or constrained by written or verbal instructions or guidelines; and the nature and extent of review of the work.

General supervision: Work is performed independently. The incumbent seldom refers matters to supervisor except for clarification of policy.

Leadworker: An employee whose permanently assigned duties include training, assisting, guiding, instructing, assigning and reviewing the work of two or more permanent full-time equivalent classified employees in the employee's work unit as assigned and documented on the work unit's organization chart. Leadworkers do not have supervisory authority as defined under s. 111.81(19), Wis. Stats.

Usually, leadworkers will be required to lead the work of two or more permanent employees in order to be credited with leadworker duties. Leadworkers cannot "share" the responsibility of leading the work of employees. For example, if two leadworkers lead the work of one employee

each and together jointly lead the work of one more employee, neither position will meet the definition of leadworker. In certain circumstances, leading the work of one other permanent employee can justify leadworker status, if the employees are located in a geographically remote office or are in the field.

Limited supervision: The incumbent proceeds on his or her own initiative while complying with policies, practices and procedures prescribed by the supervisor. The supervisor generally answers questions only on the more important phases of the work.

Some Knowledge: Is familiar with the elementary principles and terminology of the subject to effectively communicate with subject matter experts.

Specific Program Settings: Refers to positions performing program-specific or general administrative office support assistance to an agency or university-specific program. Some knowledge of the program is required.

Work Unit: The position may have responsibility at a division, bureau, section, or unit level within an agency or at a department, college, or campus level within the university system.

II.   DEFINITION

OFFICE OPERATIONS ASSOCIATE

This is complex office support work performed under close/limited progressing to general supervision. The majority of duties performed at this level <u>must</u> include any combination of complex program-related functions <u>or</u> complex administrative functions as defined below. Positions may also function as leadworker to other staff within the work unit. The duties assigned to positions at this level require analytical or independent reasoning and are more complex than those performed within the Office Associate classification. The consequence of error is greater than that of the work described at lower levels. Personal contact with employees, supervisors and the general public is common. Performance of the tasks requires extensive contact with operating units within and outside the agency or campus and occasionally between agencies or campuses. Working relationships are maintained with professional program staff and administration staff such as Accountants, Budget and Policy Analysts, Auditors, Purchasing Agents, etc.

COMPLEX PROGRAM-RELATED FUNCTIONS:

Complex program-related support functions require applied knowledge of program policies and procedures rather than general office practices. Positions often have to apply the complex administrative functions described below in program areas, where there may be unique clientele, employees, and program-specific procedures. Positions review program-related documents to determine if they meet minimum program requirement(s) or criteria such as reviewing, approving and processing applications for permits, licenses, certifications, etc.; reviewing documents for compliance with standards before submission for the next step in the process; coordinating scheduling/due dates to meet compliance standards for contract submission; and analyzing documents and compiling program-specific data. Positions search systems (databases) for historical information; function as vendor liaison on program-specific software, supplies or services; record contacts with public/applicants/constituents; and enter program data into appropriate databases and manipulate it for desired reports. Positions develop and maintain tracking systems and projects; respond to program-specific questions; request identification as required; and determine and collect required program fees. Positions establish and maintain case files; maintain electronic records of all program information, such as inspection reports, license requests, etc.; enter appropriate codes and information; and ensure files are complete.

COMPLEX ADMINISTRATIVE FUNCTIONS

Communication: logging and tracking requests for information from constituents, the Governor, legislators or other high ranking campus officials; determining the required response date, appropriate staff assignment, and appropriate signature; assuring timely completion; and reviewing the response for established standards. Duties may include receiving and or making calls to public or private offices to receive, provide, or exchange program information.

Fiscal: auditing expense vouchers, completing appropriate forms for money/checks received, submitting required documentation to the agency or campus budget office, reconciling budget items for general service expenditures; providing accounting support; monitoring and reviewing fiscal reports and invoices/vouchers; entering information into the automated purchasing or procurement system; implementing appropriate action and payment mechanisms; auditing monthly records of office's assigned credit or procurement card; completing and submitting fiscal vouchers to the agency/campus budget office.

Human Resources/Payroll: verifying leave types and balances, informing staff of employee benefit options and programs; documenting and processing information regarding work-related accidents and injuries, and workers compensation reports; providing human resources liaison support for Family Medical Leave Act, memorial fund, leaves of absence, agency database updates, and other programs; referring unanswered employee-related questions to the appropriate point of contact such as human resources or employee benefits administrators; completing personnel transactions on forms or on-line; assisting with new employee orientation activities; and coordinating and monitoring the employment interview process.

Lead Work: training, assisting, guiding, instructing and assigning and reviewing the work of two or more permanent employees in the work unit. Note: Competition is required for first time permanent assignment of leadworker duties.

Purchasing: maintaining inventory levels; corresponding with vendors to verify items and prices; preparing reports for purchasing agents; using automated inventory and purchasing system; and providing guidance to staff on procurement policies and procedures.

Staff and Resource Services: supporting the physical environment and resources of the unit; coordinating an office move; providing general telecommunications support; participating in space management activities, including expediting systems/furniture requests; procurement of equipment and office supplies; responding to requests and complaints from program staff regarding work environment conditions (temperature, lights, sound, parking, safety, etc.); and acting as the liaison with service vendors and contractors/maintenance staff.

Technology maintenance: acting as the liaison between staff and information systems staff, provide hardware/software support to users of various applications; updating and publishing specific web pages; converting files for web pages; using complex desktop publishing and graphics software; using multiple on-line databases; entering specific data into complex computer databases; writing queries; assuring back up of all files and deleting files when they are no longer required; initiating and creating tables in Microsoft Access or other comparable programs and linking to tables to provide staff with various reports and information; training staff on hardware and software packages; functioning as a resource person regarding laptop/automation questions and problems; downloading files onto laptops, including software such as MS Office, virus scan, Outlook applications, etc.; instructing staff on the use and application of forms; and attending meetings, workshops, team meetings and training sessions regarding hardware and software.

III.   QUALIFICATIONS

The qualifications required for this classification will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV.   ADMINISTRATION INFORMATION

This classification was created effective July 24, 2005 and announced in bulletin OSER-0071-MRS-SC as part of the Administrative Support Unit Survey, Phase II. This classification series replaces some of the positions classified in the Program Assistant and Secretary series.

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