

**STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION**

OFFICE 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 as the performance of routine office production functions. 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 positions that perform a variety of routine office support tasks involving a wide range and combination of duties in basic administrative functions as well as a basic knowledge of office policies and procedures. Positions may lead the work of other employees including students and LTEs. These office support positions may be found in any work unit in any state agency, college, or campus.

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 the majority of time and are more appropriately classified as Clerical Assistant.
3. Positions that perform office support activities in complex administrative and program support areas for the majority of the time and are more appropriately classified as Office Operations Associate.
4. Positions that perform confidential administrative duties as defined in s. 111.81(15), Wis. Stats., for the majority of time that are more appropriately classified as Program Assistant-Confidential and Program Assistant Advanced-Confidential.

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 routine 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 1.
7. Positions that perform paraprofessional administrative duties with a broad scope of responsibilities and reporting relationships for the majority of time 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

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

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.

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 ASSOCIATE

This is routine office support work performed under close to general supervision. Positions are located within any size work unit in an agency or on a campus and must be familiar with the organizational structure to complete tasks. They may be involved in work assignments with several interrelated operating units and may lead lower level classified staff, student workers or limited term employees. Positions perform a variety of basic office support tasks consistent with established office and agency policies and procedures with little or no ability to change the procedures. The activities are routine in nature and require little discretion as the work processes and routines are well defined and easily quantifiable.

Positions in this classification perform any combination of the basic office functions described below, for a majority of the time.

Copying: operating a high volume copy machine; high volume copying; performing minor maintenance on a copy machine; or operating, maintaining, and performing preventive maintenance on bindery and copy machines; copying and/or preparing materials to be sent for copying or printing; assuring bills and/or copying account are processed appropriately, and distributing the copies as required.

Desktop Tasks: maintaining logs, attendance records, or simple databases; batching documents; calculating time cards; performing routine daily cash and/or check receipt audits; entering data and running reports from routine databases or programs (no writing queries, creating or modifying formats); logging and entering applications; etc. Interaction with the software or program is very limited. At times the user is prompted for information by the program. Programs may be specific to the state or agency.

Document Production: (using standard word processing software such as Microsoft Office Word or comparable programs) typing correspondence for staff; editing and proofing letters, memos, and reports for grammar, spelling, punctuation, and format; preparing correspondence for staff or supervisor's signature; establishing formats for various reports, mailing lists, form letters, tables or charts; maintaining files of assignments; and developing various printouts and statistical tables.

File Maintenance: creating individual files and labels, drop filing, pulling files as requested; preparing records for the records center; establishing and maintaining a central file system, such as subject matter, alphabetical, or numerical files; maintaining database files; searching for documents as requested; pulling files for incoming correspondence; maintaining orderly storage of files; maintaining cross reference files; purging files; preparing records boxes for shipment to or retrieval from the State Records Center; making arrangements for pickup and delivery of records; maintaining record inventory logs; and reading requests for file information.

Fleet: keeping track of fleet vehicles; assigning state vehicles to staff; determining availability, explaining other options available; assuring the timely maintenance of cars; requesting a fleet vehicle; and processing related paperwork.

Forms: processing simple forms, reviewing program-related forms for completeness, answering routine questions, maintaining a database from completed form responses, or comparable.

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

Mail: opening, sorting and distributing mail, collating materials, or preparing for outgoing mail; date stamping and forwarding to appropriate staff; responding in writing to routine requests for information, including approved open record requests; coordinating outgoing mail and/or mass mailings; sending mail

certified or with other special requirements; assuring correct postage is on outgoing mail; operating scale and postage meter; forwarding faxes to appropriate staff; and sending faxes as requested.

Meetings: preparing and distributing meeting minutes; preparing materials for distribution at meetings; updating staff at meetings regarding new processes or procedures for administrative functions; setting up audiovisual equipment for meetings; maintaining official files of the committee correspondence and meetings; assisting in organizing workshops and in-service meetings; developing handouts, agendas, and other material as requested; scheduling facilities and rooms; and making catering arrangements as necessary.

Miscellaneous: making service calls; acting as cashier in a state operated parking facility; ordering routine supplies and/or maintaining inventories; identifying the source for and ordering special supplies.

Reception: taking messages; screening and directing incoming calls to the appropriate individual or business area; providing routine information and responding to routine inquiries; performing switchboard and/or paging duties; screening, receiving, logging in, and directing visitors; assigning security and parking; arranging for escorted building access; and accepting special deliveries.

Scanning: preparing documents for scanning by checking for accuracy, readability and completeness, removing all paper clips, etc., and ensuring documents are not folded or torn; annotating each document with date and time of receipt and other necessary markings, ensuring attachments are indicated; determining document types and priorities for processing; preparing the scanner and scanning the documents while reviewing the image screen to ensure clarity; and performing quality control of the scanned documents and rescanning, if necessary.

Scheduling: scheduling rooms, people, appointments, classes, or campus visits; scheduling meetings between public and staff; scheduling multiple staff and rooms for meetings; and maintaining schedule calendars for staff.

Tracking: developing simple reports, or tracking specific information; maintaining a procedure for assigning and tracking internal issues and projects; updating related databases as needed; preparing simple reports from databases; assuring the information submitted is complete; maintaining a complaint log, and assuring responses are completed timely.

Travel: assisting staff with travel arrangements by car, rail or air; making hotel accommodations; using the internet to find travel information and/or to make reservations; assuring requests are completed appropriately and submitted to appropriate office; and assuring payment of travel has occurred. Positions may monitor monthly travel vouchers and vehicle mileage logs submitted by staff for accuracy and completeness.

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.