



**PRINCIPAL OFFICE SUPPORT
JOB CLASSIFICATIONS
IN CITY GOVERNMENT**

**Department of Employee Relations
City of Milwaukee**

April 25, 1996 (with revisions)

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Preface

Principal Office Support Job Classifications in City Government

This document includes new job classifications for office support positions in City government resulting from a City-wide study conducted by the Department of Employee Relations in 1995. We have used the EEOC's definition of office and clerical work as the basis of our definition of office support work: "occupations in which workers are responsible for internal and external communication, recording and retrieval of data and/or information and other paperwork required in an office."

These job classifications were composed by the staff of the Department of Employee Relations as part of a project to streamline and modernize job classifications for office support positions and other related groups. Each series (*Office Assistant, Accounting Assistant, Communications Assistant, and so forth*) is defined, as well as the levels within each of those series. Currently existing minimum requirements have also been incorporated.

A Study Team comprised of representatives of three different unions (AFSCME, District Council 48, AFL-CIO; ALEASP, Police Department; and Local 61, Sanitation Workers), managers from various City departments, and affected employees reviewed these new definitions prior to being finalized and distributed.

As written, they are intended to provide City employees with a common source of information about the different kinds of work performed by office support personnel, as reflected in each series. They also demonstrate increasingly higher levels of knowledge, skill, responsibility, and effort required by each succeeding level within each job series.

Good job evaluation, the basis of a sound compensation system, requires extensive comparison and contrast of the duties and responsibilities between all jobs within an organization, and an assessment of the responsibility, knowledge, skill, and effort required. Consideration is also given to current rates of pay and minimums and maximums of pay ranges. The definitions provided here are consequently intended to be used as a guide in the job evaluation process, as opposed to "the answer" to all subsequent classification issues involving office support positions.

It is also important to note that both the definitions and minimum requirements are subject to change, and are in fact expected to change through the approaching years as office support work continues to grow and evolve.

Laura E. Sutherland
Human Resources Representative

OFFICE ASSISTANT SERIES

This series includes all clerical and office positions in City government performing general office duties, as distinguished from those working directly with one or a few managers, professionals, or elected officials in a secretarial capacity.

Office Assistant I

Performs uncomplicated clerical duties, such as compiling records, filing, preparing mailings, screening calls, providing information and answers to questions in person or over the telephone, photocopying, tabulating, posting information, sorting and distributing mail. May use typewriter for activities other than producing documents, such as typing labels and envelopes. May occasionally work with others on a team to complete special projects. May use keyboard to obtain information or enter data from automated data bases.

Requirements: Must be City resident at time of application. Ability to type 45 w.p.m.

Office Assistant II

Performs varied clerical duties in accordance with standard procedures. Applies knowledge of departmental policies and procedures, and uses a general understanding of other departments' functions. Screens telephone calls, answers questions and provides information. May work with others on a team to complete special projects. Accesses and inputs information via mainframe applications. Uses office equipment and microcomputer software to prepare standard and complex documents from various sources of written or dictated input.

Requirements: Two years of clerical experience with at least six months of experience as an Office Assistant I.

Office Assistant III

Performs diverse and complex duties involving the application of standard procedures to a variety of clerical assignments. Selects and interprets data, and demonstrates a thorough knowledge of departmental and organizational policies and procedures in assigned area of responsibility. Screens telephone calls, answers questions, and provides information. Some telephone and in-person work may be difficult due to the nature of questions or customers served. Uses advanced features of software packages on a regular basis to produce complex documents. May work with others on a team to complete special projects. May guide and check the work of other employees.

Requirements: Four years of clerical experience with at least one year of experience at the Office Assistant II level or above. Job-related coursework may be substituted for up to six months of experience requirement.

Office Assistant IV

In addition to all of the duties listed for the Office Assistant III, and the corresponding knowledge, skills, and abilities associated with them, acts as a group leader for lower level employees. Responsibility as a group leader usually includes basic office management such as monitoring equipment and ordering supplies, monitoring and improving office procedures and practices, and directing a small group of employees. May work with others on a team to complete special projects.

AND/OR

Exercises responsibility for a specific function or service area requiring extensive knowledge of technical and/or complex procedures and processes having a significant consequence of error. This requires responsibility for monitoring and improving those procedures on a continuous basis.

Requirements: Four years of clerical experience with at least six months of experience at the Office Assistant III level or above. Job-related coursework may be substituted for up to six months of the experience requirement.

Created April 10, 1996 (L. Sutherland)

OFFICE COORDINATOR

This job classification includes those positions responsible for performing a variety of office work required to operate a small to medium-size office who do not exercise *bona fide* management and supervisory authority

OR

lead worker positions in the Housing Authority/Department of City Development having significant responsibility for "supervising," orienting, training, coaching, and at times working as "Housing Clerks." These two positions also have significant responsibility for improving and standardizing office procedures and implementing office automation in all housing developments.

The type of work performed by the first type of Office Coordinator consists of a variety of office work, such as processing payroll, performing purchasing tasks, maintaining automated and manual files, producing documents, tracking expenditures, collecting information for budget preparation and reports, and other administrative work.

After it has been determined that a position performs the type of work associated with the Office Coordinator classification, the primary determiner of whether the position is functioning at the level of this job classification rests upon the degree of responsibility exercised. This is reflected in such areas as the scope of work performed, impact of work performed, probable consequence of error, and/or independent decision making required. The level of responsibility must be demonstratively above and beyond that of the Office Assistant IV, which is the highest level of general clerical/office work in City government.

In some instances the level of responsibility is driven by a position being the sole office support person for a particular office. In other instances the level of responsibility is driven by the scope of duties, meaning the number of different things for which a position is responsible. In other instances the level of responsibility is driven a position's overall impact and probable consequence of error, or a combination of these factors.

The pay range allocation for this job classification is equal to that of Program Assistant I, Pay Range 460, which is considered a semiprofessional job group. The level of education and training required for Office Coordinator and others assigned to Pay Range 460 is an associate's degree or the equivalent.

Created August 28, 1997 (L. Sutherland)

OFFICE SUPERVISOR SERIES

This series includes those positions whose primary function is to manage the operations, work systems, and personnel of a small office or unit. As *bona fide* managers, Office Supervisors have the authority to make a wide range of decisions regarding personnel and the commitment of departmental resources.

Office Supervisor II

The vast majority of positions allocated to this series are classified as Office Supervisors II in Salary Grade 002. As first-line supervisors of office personnel, they assign work, guide, train, lead, and evaluate the personnel and work operations in a particular office, service, program, or section in City government. As management employees, they have the authority to make decisions regarding hiring, training, job performance, job assignments, and discipline, and other related matters.

Typical duties of the Office Supervisor II classification include:

Directly supervising a small staff of office support personnel. In the largest operations, such as the Police Department, emphasis is placed upon efficient scheduling, administration of personnel documents, and overall work flow. Smaller departments emphasize training, leading, and coaching employees in this area.

Analyzing work processes and making improvements where practicable.

Performing a variety of administrative duties needed to run an office such as ordering supplies and materials; evaluating equipment, hardware, and software needs and ordering upgrades; creating and maintaining files and filing systems; administering record retention systems; assessing telephone needs and coordinating installations; and maintaining financial, budgetary, personnel, and other types of records.

Preparing budget documents and supporting documentation for annual and ongoing budget requests. Monitoring budget expenditures. Preparing requisitions and payment certifications for office supplies, equipment, and services.

Researching and analyzing issues related to the work of the section. Presenting conclusions and recommendations regarding issues, orally and/or in writing.

Preparing technical, financial, statistical, and other types of written reports.

Requirements: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Office Supervisor I

The Office Supervisor I is distinguished from the higher "II" level by its exercise of less responsibility for office management procedures and personnel. Positions at this level are responsible for operating a specific service or program in a one-person office, such as the Policeman's Annuity and Benefit Fund, or supervising the personnel and operations of a specific function, such as the preparation and distribution of all agendas associated with the Common Council and its Committees.

Requirements: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Created April 16, 1997 (L. Sutherland)

PROGRAM ASSISTANT SERIES

Positions assigned to the Program Assistant series perform a variety of office support and administrative work in support of a program or distinct area of operations within a City department. As used here the term "program" is intended to be broad in application, encompassing the work of a bureau, division, section, or specific program within a department. The duties and responsibilities of each Program Assistant are specific to each job assignment.

The level of work performed by Program Assistants is characterized as semiprofessional. As such, the Program Assistant series serves as a "bridge" between a number of office support job series and *bona fide* professional occupations, such as Management Accountant and Administrative Specialist, requiring a bachelor's degree or equivalent.

In this series, positions requiring the knowledge, skills, and abilities equivalent to that of a bachelor's degree have been assigned to the "II" level. Commensurate with their higher level of knowledge and skill, Program Assistants II also exercise a greater amount of responsibility, also known as impact and accountability, than those assigned to the "I" level.

Program Assistant I

Performs duties and responsibilities to support the work of professionals and/or managers in a specific area of operations or program within a City department. Requires good working knowledge of policies and procedures associated with a particular program or area of operations and significant on-the-job work experience in the area. Carries out duties and responsibilities very independently. Consults with managers and professionals regarding unusual situations requiring the interpretation of policies.

Requirements: Four years of office support experience performing duties related to the occupational area in which the position is assigned, with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Program Assistant II

Performs a variety of duties and responsibilities to support a program or area of operations within a City department. In addition to the knowledge and skill required of the "I" level, positions assigned to the "II" level require the equivalent knowledge and skill normally obtained with a bachelor's degree. Some Program Assistants II function as group leaders for other employees.

A hallmark of the Program Assistant II is the **analysis** of information, in contrast to gathering or compiling information. In analyzing information, the employee is required to draw conclusions and make recommendations from information presented. This information may be in the form of accounting information, budget records and reports, financial information, contracts, or qualitative information. Program Assistants II and are expected to independently initiate new work projects and improve processes on a continuous basis.

Requirements: Four years of clerical experience performing duties related to the occupational area to which the position is assigned, with at least one year of experience at the Office Assistant III level or above. The knowledge and skills required are equivalent to a bachelor's degree. Equivalent combinations of education and experience may be considered.

Created April 10, 1996 (L. Sutherland)
Revised June 4, 1997 (L. Sutherland)
Revised August 12, 1997 (L. Sutherland)

ACCOUNTING ASSISTANT SERIES

This series includes positions that perform clerical and accounting related tasks in such activities as purchasing, paying bills, receiving payments, maintaining production and budgetary records, checking payroll records, examining accounting records, and/or other related activities in accounting and financial areas.

Accounting Assistant I

Performs reoccurring clerical/accounting tasks in general accounting, accounts payable, accounts receivable or a related accounting or financial area. Posts journal entries, enters data into automated data bases, processes payments and purchasing documents, verifies information, and may assist in preparing accounting reports. Uses microcomputer software and mainframe applications. May contact outside agencies to resolve problems. Requires knowledge of basic accounting terminology, accounting concepts, and purchasing procedures. May assist with basic payroll-related work, maintenance of personnel records, and benefits processing.

Requirements: Four years of clerical experience including at least one year performing basic accounting duties. College-level or technical coursework may be substituted for part of the experience requirement.

Accounting Assistant II

Performs more complex clerical and accounting functions in accordance with standard procedures in such areas as balancing general or subsidiary ledgers, processing payments, purchasing supplies, materials, and services, and compiling monthly closings, annual reports, and other financial statements. Contacts other departments and/or outside agencies to resolve problems. Responds to questions from other employees, vendors, customers, and the like on a regular basis. Works independently. Consequence of error is higher and may involve larger sums of money than at the "I" level. Prepares accounting documents and related correspondence. Uses regular and advanced features of microcomputer software and mainframe applications. Often functions as a group leader. Requires knowledge of basic accounting terminology and concepts, a working knowledge of the City's accounting system, and working knowledge of the City's purchasing procedures. May have authority to sign or countersign checks or payment certifications. May perform the Personnel Payroll Assistant functions in addition to other accounting functions.

Requirements: Four years of clerical experience including at least one year at the Accounting Assistant II level. College-level or technical coursework may be substituted for part of the experience requirement. No substitution will be allowed for the one year of experience at the Accounting Assistant I level.

Accounting Assistant III

Performs the most complex and responsible work in City government not requiring a college degree or equivalent. The work associated with this level carries a degree of responsibility and associated knowledge and skill significantly and demonstrably above that of the "II" level.

The defining characteristic of the Accounting Assistant III is that, in addition to exercising a definably higher level of responsibility, as stated above, the "III" serves as a group leader for three or more lower level employees OR provides guidance and oversight to Accounting Assistants II regarding accounting practices and procedures throughout City government. Current assignments for Accounting Assistants III include the Comptroller's Office and the Milwaukee Public Library.

Requirements: Four years of clerical experience including at least one year at the Accounting Assistant II level. College -level or technical coursework may be substituted for part of the experience requirement. No substitution will be allowed for the one year of experience at the Accounting Assistant II level.

Created April 10, 1996 (L. Sutherland)
Revised August 12, 1997 (L. Sutherland)

ADMINISTRATIVE ASSISTANT ("Secretary") SERIES

This series includes all office support positions performing secretarial duties directly supporting the work of one or more managers or high-level professionals. The managers to whom these Administrative Assistants report are usually in middle management, and often in top management. Positions performing general office work not directly supporting the work of a manager, as a personal secretary, are included in the Office Assistant series. Higher level office support positions having their own distinct area of responsibility, apart from that associated with a manager, are included in the Program Assistant series.

Positions reporting directly to an elected official are included in the Executive Administrative Assistant series.

Administrative Assistant I ("Secretary")

Performs standard secretarial duties requiring some previous office and secretarial experience, skill and knowledge of organization policies and practices. Prepares correspondence, memoranda, reports, and the like, from various sources of written or dictated output. Some information may be confidential. (As the term is used in this series, "confidential" means information that a manager wishes to keep private and/or restricted to certain other individuals. "Confidential" information may pertain to many topics; it is not restricted to issues involving collective bargaining, personnel matters, or labor relations issues.)

May compose routine correspondence and memoranda. Screens telephone calls and visitors, and resolves routine inquiries. May schedule and maintain calendar of appointments, meetings, and travel itineraries, and coordinate related arrangements. May take and prepare minutes for distribution. May work with others on a team to complete special projects. Uses microcomputer software and mainframe applications. *Typically provides secretarial services to one or two managers or a one or two high-level professionals.*

Requirements: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Administrative Assistant II ("Senior Secretary")

Performs standard, advanced, and confidential secretarial duties requiring broad experience, skill, and knowledge of organization policies and practices. Screens telephone calls and visitors, and resolves routine and some complex inquiries. Schedule and maintains calendar of appointments, meetings, and travel itineraries, and coordinates related arrangements.

Takes, prepares, and distributes minutes of meetings. Prepares correspondence, memoranda, reports, and the like, from various sources of written or dictated output. May compose correspondence and memoranda on routine matters for the manager's signature.

Searches records and data bases for information needed by the manger for reports, speeches, and other uses. May follow up on correspondence, projects, and requests from the manager to others in the organization. May act as a group leader for special projects and work with others to complete special projects. Uses advanced features of microcomputer software. Uses mainframe applications. *Typically provides secretarial services to one high-level manager, such as a division or section head.*

Requirements: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Administrative Assistant III ("Administrative Secretary")

Performs advanced, diversified, and confidential secretarial and administrative duties requiring broad and comprehensive experience, skill and knowledge of organization policies and practices. Tracks and monitors correspondence and projects assigned to others by department head. Prepares correspondence, memoranda, reports, and the like, from various sources of written or dictated output. Composes and may initiate routine correspondence and memoranda for the manager's signature.

Searches records and data bases for information needed by the manger for reports, speeches, and other uses. Follows up on correspondence, projects, and requests from the manager to others in the organization. Screens telephone calls and visitors, and resolves routine and some complex inquiries. Schedules and maintains calendar of appointments, meetings and travel itineraries, and coordinates related arrangements.

Prepares agendas, takes minutes at board meetings and other less formal meetings, prepares minutes and meeting summaries for distribution, and distributes minutes of meetings. Acts as a group leader for projects and may work with others on teams to complete special projects. Uses advanced features of microcomputer software. Uses mainframe applications. *Typically provides administrative and secretarial services to a formal board or commission and the head of a major organizational function such as library services, and human resources.*

This is the second highest "secretarial" job classification in City government. There are currently eight positions classified as Administrative Assistant III.

Requirements: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Administrative Assistant IV ("Senior Administrative Secretary")

Performs advanced, diversified, and confidential secretarial and administrative duties requiring broad and comprehensive experience, skill and knowledge of organization policies and practices. Prepares correspondence, memoranda, reports, and the like, from various sources of written or dictated output. Composes and may initiate routine and non-routine correspondence and memoranda for the manager's signature.

Searches records and data bases for information needed by the manager for reports, speeches, and other uses. Follows up on correspondence, projects, and requests from the department head to others in the organization. Screens telephone calls and visitors, and resolves routine and some complex inquiries.

Schedules and maintains calendar of appointments, meetings and travel itineraries, and coordinates related arrangements. Prepares agendas and takes minutes at board meetings, staff meetings and the like, prepares minutes and meeting summaries for distribution, and distributes minutes of meetings. Acts as a group leader for projects and may work with others on teams to complete special projects. Uses advanced features of microcomputer software. Uses mainframe applications. *Provides administrative and secretarial services to the director of an extremely complex and multifaceted department.*

This job classification, and that of Executive Administrative Assistant, constitute the highest "secretarial" level in City government. Employees classified as Administrative Assistants IV work directly for either the

Chief of Police
Fire Chief, or
Commissioner of City Development.

Requirements: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Created April 22, 1996 (L. Sutherland)
Revised August 13, 1997 (L. Sutherland)

EXECUTIVE ADMINISTRATIVE ASSISTANT SERIES

This series includes only those positions performing secretarial and administrative duties directly for elected officials. The duties and responsibilities performed generally conform to that of the Administrative Assistant IV job classification.

It is intended that employees initially appointed to this series will begin employment as Executive Administrative Assistants in Salary Grade 001. After two years of successful experience performing the job, they will have the opportunity to be promoted to the "II" level in Salary Grade 002.

These positions have been allocated to Salary Grades 001 and 002, apart from all other office support job classifications in City government, because the negative effects of poor performance, poor judgement, and consequence of error on the part of an individual filling one these positions has a serious, direct, immediate, and personal impact upon the elected official to a degree not experienced by other top managers in City government.

Requirements for Executive Administrative Assistant I: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Requirements for Executive Administrative Assistant II: Four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Created April 25, 1996 (L. Sutherland)

LEGAL OFFICE ASSISTANT SERIES

This series includes positions that perform secretarial and related services primarily for attorneys and other legal professionals.

Positions included in this series spend the majority of their time preparing or assisting in the preparation of legal and related documents. As such, they are required to have a strong working knowledge of legal forms, documents, and citations as well as basic legal procedures.

The various levels of Legal Office Assistant are distinguished from each other by the amount of independent judgement exercised, responsibility for the work of others, the type and impact of the documents they prepare, the level of attorney that they work for, and various administrative responsibilities.

These positions are typically filled by individuals who have legal secretarial and related experience prior to being appointed as a Legal Office Assistant.

Legal Office Assistant I

The Legal Office Assistant I serves as the entry-level for the Legal Office Assistant classification. A high school diploma or equivalent along with experience in working with word processing software are required. Legal secretarial experience is highly desirable for this level.

Legal Office Assistant I positions are typically called upon to type the most basic legal documents which may include opinions, correspondence, briefs and pleadings. Positions assigned to the Prosecutorial Division of the City Attorney's Office may be called upon to open, maintain, and docket case files, coordinate case file calendars, and prepare subpoenas.

Legal Office Assistant I positions may also be used to underfill the Legal Office Assistant II.

Requirements: Two years of clerical experience in a law office performing duties related to this position. Ability to type 50 wpm. Legal secretarial training may be substituted for up to one year of the experience requirement.

Legal Office Assistant II

The Legal Office Assistant II represents the journey level for the Legal Office Assistant Series. It is distinguished from the I level in that it performs a wider array of more technical legal secretarial duties which include typing, transcribing, preparing, copying, and/or processing legal documents, briefs, pleadings, correspondence, opinions, ordinances, resolutions, bonds, contracts, and related agreements.

Requirements: Four years of clerical experience which includes at least two years of experience in a law office performing duties related to this position. Ability to type 70 wpm. Legal secretarial training may be substituted for up to one year of the experience requirement.

Legal Office Assistant III

The Legal Office Assistant III is distinguished from the II level by its lead worker responsibilities. In this capacity, these positions act as Lead Secretaries of a particular Legal section and are called upon to prioritize, assign, and monitor incoming and outgoing workflow, and provide training and guidance to entry and journey level Legal Secretaries.

Qualifications for this level include at least 4 years of experience as a Legal Office Assistant, two or more of which should be at the II level, or equivalent legal experience outside of the City.

Requirements: Five years of clerical experience which includes at least three years of experience in a law office performing duties related to this position. Ability to type 80 wpm. Legal secretarial training may be substituted for up to one year of the experience requirement.

Legal Office Assistant IV

Legal Office Assistant IV positions perform a variety of higher level secretarial and administrative support functions and represent the highest level Legal Office Assistant positions in the City. Legal Office Assistant IV positions are distinguished from the III level by serving as an executive secretary to a Special Deputy City Attorney, performing payroll and related functions, and/or supervising a clerical staff. Specific duties may include scheduling appointments and meetings, maintaining attorney opinion and assignment databases, performing various payroll and related functions, and supervising Legal Secretaries and other clerical and office support personnel.

Requirements: Five years of clerical experience in a law office performing duties related to this position including at least two years of experience at the level of a Legal Office Assistant III or above. Ability to type 80 wpm. Legal secretarial training may be substituted for up to one year of the experience requirement.

Created April 10, 1996 (D. Holland)

PERSONNEL PAYROLL ASSISTANT SERIES

This series includes positions primarily involved in processing payrolls and administering non-insurance benefits, personnel policies, and procedures.

Personnel Payroll Assistant I

Performs basic payroll related work. Calculates hours worked from time sheets, production records, and other written sources. Checks time sheets for accuracy and makes corrections when necessary. Keeps payroll related personnel records. Answers questions regarding pay practices and related benefits. Inputs data, including personnel transactions, into computerized payroll system. May work with others on a team to complete special projects. Uses microcomputer software to produce reports when needed. Retrieves information from computerized payroll system. Uses calculator and other office machinery.

Requires basic knowledge of payroll and related personnel practices and procedures, ability to check numerical data and perform calculations accurately, ability to work cooperatively with others in seeking information and answering questions, and ability to learn complex payroll and personnel procedures.

Requirements: Four years of clerical experience including at least one year performing basic payroll duties. College-level or technical coursework may be substituted for part of the experience requirement.

Personnel Payroll Assistant II

The Personnel/Payroll Assistant II is distinguished from the I level by some or all of the following:

Often functions as a group leader within the work unit. Performs difficult payroll processing for larger organizational units (over 250 employees). Processes payroll for multiple employee groups/bargaining units. Maintains records for multi-titled employees and processes multiple time cards. Maintains complex salary histories. Administers more complex and varied benefits. Performs more complicated biweekly costs accounting associated with labor hours and overhead. Often performs other complex accounting functions within a larger accounting or administrative work unit.

Requirements: Four years of clerical experience including at least one year at the Personnel Payroll Assistant I level. College-level or technical coursework may be substituted for part of the experience requirement. No substitution will be allowed for the one year of experience at the Personnel Payroll Assistant I level.

Personnel Payroll Assistant III

This level is distinguished from the "II" level by its greater scope of responsibility, which not only includes complex and difficult payroll processing, but the maintenance of personnel records, benefits administration, compilation and creation of special personnel reports, provision of employment information to the public, and general human resources administration on a semiprofessional level.

The knowledge base associated with this level consequently must be broader in terms of personnel laws, practices, and procedures, than that of the Administrative Assistant II. Likewise, interpersonal skills must be at a higher level to effectively interact with employees, managers, and the public. Current work assignments include the Milwaukee Public Library, Department of City Development, and the Department of Employee Relations.

OR

Provides guidance and oversight to Accounting Assistants II throughout City government regarding complex payroll, benefits, and taxation issues and situations.

Requirements: Four years of clerical experience including at least one year at the Personnel Payroll Assistant II level. College-level or technical coursework may be substituted for part of the experience requirement. No substitution will be allowed for the one year of experience at the Personnel Payroll Assistant II level.

Created April 10, 1996 (L. Sutherland)

COMMUNICATIONS ASSISTANT SERIES

The primary function of positions in the Communications Assistant series is to facilitate the transfer of information between City operations and its internal and external customers. The importance of this role and the amount of time spent in communications is what distinguishes these positions from other office positions in City government. Communications Assistants spend virtually all of their time obtaining information from various sources and conveying information to others using a variety of communications devices and in direct fact-to-face contact. Positions may communicate with either internal or external customers. Positions in this series may be assigned secondary duties (i.e., record keeping, greeting visitors, etc.), but the performance of the primary function generally takes precedence over secondary duties. It is expected that interruptions during the performance of secondary duties may be frequent.

Communications Assistant I

Typically called upon to transfer and process information of an ordinary nature in the manner of a telephone operator. May involve decision making within prescribed guidelines. Current work assignments include the Library's main switchboard, the Office of the City Clerk/Common Council, and those employees who work at the tow desk in the Police Department.

Requirements: Two years of experience performing duties related to the communications area.

Communications Assistant II

Most communications are of a routine nature, but may be called upon to handle fairly difficult or complex situations. Decisions occasionally require the interpretation of standard procedures. May provide guidance to Assistants at the "I" level. Current work assignments include the City Hall Information Center Desk and lead positions at the Tow Desk in the Police Department.

Requirements: Two years of experience performing duties related to the communications area.

Communications Assistant III

The scope of information being communicated falls within a limited range, but the processing of such information requires an understanding of the technical nature of the work involved. This knowledge is one of the differentiating factors between the "II" and "III" levels. Positions at the "III" level are expected to contact and/or dispatch appropriate personnel and explain the technical nature of the situation. Current assignments include the dispatching function in several Public Works areas and the Teletype Desk in the Police Department.

Requirements: Experience performing duties related to this position as determined by the hiring authority.

Communications Assistant IV

Communications are varied and problem solving or trouble shooting may be required in order to handle the situation. Matters are of a technical nature and require substantial technical knowledge in order to process. Current assignments include higher level dispatchers in several Public Works areas.

Requirements: Experience performing duties related to this position as determined by the hiring authority.

Communications Assistant V

The Communications Assistant V is distinguished from the "IV" level by a greater responsibility for solving/trouble shooting problems with a greater consequence of error. Positions require the ability to work with very technical and complex information such as water engineering quarter sections and City maps. Current work assignments are limited to the Control Center of the Milwaukee Water Works.

Requirements: Experience performing duties related to this position as determined by the hiring authority.

Created April 11, 1996 (K. Scherkenbach)

CUSTOMER SERVICE REPRESENTATIVE SERIES

This series includes office support positions functioning in a designated customer service section. Employees filling these positions must spend a minimum of 70% of the time communicating directly with customers, whether by telephone, in-person or through written or electronic means.

The purpose of communicating with customers is to solve problems customers have with services provided or bills received. Employees filling these positions must therefore have the authority to independently resolve customers' problems and issues, within guidelines provided, without prior approval by others. They are authorized to make commitments on behalf of the employer, within established guidelines.

Employees filling these positions may also maintain records, some of which may be complex or involve financial information. They may also handle cash or other types of payments.

In summary, positions classified as Customer Service Representatives must:

- work in a designated customer services section
- spend 70% or more of the time communicating with customers to solve customer-related problems
- have the authority to solve customers' problems, within guidelines established

The I and II levels of this series are part of a promotional program in which new Customer Service Representatives are hired at the I level and promoted to the II level after employees have completed two years of successful work experience at the I level.

The III level is reserved for those Customer Service Representatives who independently resolve problems with customers' bills and accounts OR act as *bona fide* leadworkers with lower level Customer Service Representatives or other office support employees.

Due to the fact that the Customer Service Representative I level is paid at the same rate as the Office Assistant III job classification, Customer Service Representative jobs are usually filled by experienced office support employees. Employees filling these jobs are usually filled by experienced office support employees. Employees filling these jobs are required to have excellent interpersonal communication skills and an interest and affinity for working with customers in answering questions and solving problems.

Current work assignments for Customer Service Representatives include the Office of the City Treasurer, Milwaukee Water works, Department of Neighborhood Services, and Department of Public Works.

Customer Service Representative I

This is the entry level for this series. Customer Service Representative I positions are typically called upon to answer customers' questions, perform some rudimentary research and follow-up, and resolve basic customer problems.

In the City Treasurer's Office and Milwaukee Water Works, employees prepare financial statements and billings, handle and process cash and related deposits, maintain various financial accounts, arrange for installment and other special payment provisions, and perform other related duties.

Requirements: Four years of office support experience, including at least one year of customer service-related experience.

Customer Service Representative II

This is the full performance level for all Customer Service Representatives, except those having responsibility for adjusting bills, payments, or other matters having a direct financial impact upon customers. Employees at this level are expected to independently answer customers' questions about departmental operations, investigate problems, follow up with customers, and most importantly, resolve customers' problems.

Requirements: Four years of office support job experience including at least two years of experience performing customer service-related work at the level of a Customer Service Representative I or above.

Customer Service Representative III

This level is reserved for Customer Service Representatives who either:

1. Assist customers regarding their bills and accounts, with an emphasis upon solving problems,
- OR
2. Perform as a leadworker for lower level Customer Service Representatives or other office support employees.

The types of bills and customer accounts for which Customer Service Representatives are responsible include bills for water and sewer services, damaged City property, property taxes, special assessments, and delinquent taxes.

Representatives at the III level are authorized to adjust bills and set up payment plans. This requires the ability to make calculations, communicate with customers who may be especially upset or despondent, and exercise good judgement. Leadworkers for other Customer Service Representatives must train and orient new employees, assign duties, check completed work, and monitor workflow.

Requirements: Four years of office support experience including at least two years of experience performing customer service-related work at the level of a Customer Service Representative II or above.

Created April 10, 1996 (D. Holland)
Revised July 20, 1999 (L. Sutherland)

LIBRARY CIRCULATION SERIES

This series includes positions that provide library-specific clerical and related services in support of circulation activities.

Positions included in this series spend the majority of their time performing and overseeing various circulation related duties including retrieving, processing, packing, shelving, sorting, and other related functions associated with library materials.

The various levels within this series are distinguished from each other by the complexity of the work performed, responsibility for the work of others, responsibility for handling cash, and various administrative responsibilities.

Library Circulation Aide

The Library Circulation Aide serves as the student-level position for the Circulation Series and the Library as a whole. Current status as a high school, technical school, or college student carrying at least three credits.

Library Circulation Aides may be, depending upon whether they are assigned to the Central or various neighborhood branch libraries, called upon to sort and shelve circulating and reference books and other library materials, charge and discharge books and other materials, collect necessary charges where applicable, answer general in-person questions, pack materials for mailing and shipping, calling branch and suburban libraries to locate materials not found at the Central Library, maintain manual files, and perform other routine library-related clerical work.

Library Circulation Assistant I

The Library Circulation Assistant I serves as the bona-fied entry-level for the Library Circulation series. There are no specific requirements stipulated for this classification.

Library Circulation Assistant I positions, depending upon job assignment, may work at the Central Library or various neighborhood branch libraries. They are called upon to sort and verify books and other materials for return to shelves or other agencies, read shelves to ensure that materials are in the proper order, perform inventory searches for materials, keep inventory up-to-date, charge and discharge books, collect charges on overdue, lost, damaged, or reserved materials, refund cash for located materials, maintain system-wide receipt file for lost and damaged materials, issue refund notices, assist applicants in registering for and reporting lost library cards, perform clerical duties associated with the acquisition of new books and the discarding of old books, prepare materials for bindery, bar code and place security targets in books, assist with the training of new materials, assist in the opening and closing procedures, assist in monitoring patron behavior, and other related duties as assigned.

Library Circulation Assistant II

The Library Circulation Assistant II is distinguished from the I level in that it either serves as a lead worker which often includes assisting in the scheduling, training, and monitoring the work of lower level Library Circulation personnel or assists the Librarian III in charge of Mobile Services in planning programs, setting up a schedule of stops, and training youth and other temporary workers on the bookmobile and other areas of the Mobile Services Unit.

Additional duties for lead workers often include compiling statistical reports, maintaining various records, assisting in the preparation of weekly vacation schedules, assisting in the completion of the various Circulation related reports, preparing cash and counting money for the Circulation Bureau, and participating in supervisory and general staff meetings.

Additional duties for Mobile Services personnel often include selecting books and other materials for the bookmobile van, operating various audio-visual and related equipment, selecting books and films for programs, driving the bookmobile, developing and presenting a wide variety of family oriented book-reading, puppet-show, slide, film and other related programs, promoting the use of library materials and services, and other related duties as assigned.

Qualifications for this level include at least two years of experience as a Library Circulation Assistant I.

Library Circulation Assistant III

The Library Circulation Assistant III is distinguished from the II level by its overall administrative responsibility for one of two specific areas: the Central Registration Desk and Tier Service and Book Handling. These positions supervise, train, evaluate and assist lower level staff, interview applicants for borrowers' cards, verify applications, issuing fee, company and organization cards, supervise and assist in the maintenance of records, secure or "trap" patron cards for returned checks, supervising personnel assigned to counting and recovering daily cash, prepare financial statements, ensure the proper shelving of materials, oversee the sorting of materials, oversee various book handling activities, acting as a night and weekend supervisor as needed, handling various procedural and personnel problems, and other related duties as assigned.

Qualifications for this level include four years of clerical experience performing duties related to this position including at least one year of experience as a Library Circulation Assistant II or above.

Created April 24, 1996 (K. Scherkenbach)

LIBRARY TECHNICIAN SERIES

This series includes positions that perform a variety of duties associated with the processing various technical and special Library materials as well as other specialized filing, coding, shelving and other cataloging support functions.

Positions included in this series spend the majority of their time participating in or overseeing activities such as checking in and claiming periodicals, newspapers, audio-visual and other specialized materials, searching for specialized titles and materials, retrieving specialized information for a specific subject area, and other processing and cataloging support functions.

The various levels of Library Technician are distinguished from each other by the complexity of the work performed, responsibility for the work of others, and various administrative responsibilities.

Library Technician I

The Library Technician I is the entry-level of this series, which is characterized by performing a variety of duties associated with library work.

Library Technician II

The Library Technician II is a journey-level position requiring two years experience related to library work.

Library Technician II positions, depending upon work assignment, perform a variety of duties related to processing and cataloging functions, such as checking in and routing periodicals, newspapers, and magazines, preparing subscription and standing order invoices, entering invoice information on a Professional File database, renewing invoices, answering telephone and in-person staff inquiries related to serials materials, processing audio-visual materials, maintaining various library statistics and paper files, preparing and maintaining magazine files, working with specialized files, producing card catalogues, typing subject guide cards, working with specific book types i.e. adult books, separating and distributing bar codes, book labels, and spine labels, transferring materials from one agency to another via the shelf list database, processing Vertical File material, filing cards in the Union and Official Catalogs, interfiling process slips in Dewey sequence, checking in daily shipments of U.S. Government Depository and non-Depository documents, typing envelopes, subject authority, and cross reference cards, and other related duties as assigned.

Library Technician III

The Library Technician III is distinguished from the II level in that it often serves as a leadworker for Library Technician II positions and other personnel and/or has responsibility for a specialized subject area. Specific duties and responsibilities may include distributing and monitoring workflow, training new staff members, developing procedures, overseeing the general operation of various library related automated systems, overseeing various cataloging support functions, maintaining specialized filing systems, retrieving information and materials to answer inquiries related to specialized subject areas, i.e. Great Lakes Vessels and their history, and other related duties as assigned.

Qualifications for this level include four years of clerical experience with at least six months of experience at the II level or above.

Library Technician IV

The Library Technician IV is distinguished from the III level in that it has overall responsibility for all clerical and support activities related to Copy Cataloging, Serials, or Acquisitions. These positions work closely with professional Librarians to develop and implement operational methods, coordinate and oversee the daily work activities of all assigned clerical staff, independently develop and implement procedures, compile and monitor production statistics, assist the Librarian V in charge of Technical Services in formulating performance standards and related evaluations, and other related duties as assigned.

Qualifications for this level include four years of related clerical experience with at least one year of experience at the III level or above. Equivalent combinations of education and experience will be considered.

Created April 24, 1996 (K. Scherkenbach)
Revised May 23, 1996 (L. Sutherland)

LIBRARY SERVICES ASSISTANT

This series includes positions that provide paraprofessional library services to either various areas of the Central Library or Neighborhood Libraries. Although this is a single classification series, the duties and responsibilities associated with the Central versus Neighborhood Libraries differ significantly.

Library Services Assistants assigned to Neighborhood Libraries are charged with participating in selection interviews, supervising a clerical staff, formulating work and vacation schedules, assigning staff to assist in other areas, evaluating performance, assisting in the development of training and related procedures, resolving patron problems, filling in for professional Librarians as needed, maintaining proper library patron and staff behavior, determining shelf list discrepancies and other related duties as assigned.

Library Services Assistants assigned to various areas within the Central Library perform a wide array of paraprofessional and other library-specific technical duties. These duties may include servicing media collections, searching book reviews, conducting book searches, working with special collections, performing public service duties at the Ready Reference, Card Catalog Assistance, General Reference and Periodical Desk, processing, selecting, and maintaining files of special materials, maintaining library shelf lists, processing interlibrary loans, performing and directing the performance of bibliographic verification and location searches for incoming and outgoing requests, serving as a liaison between the Milwaukee Public Library and other Librarians across the State, and other related duties as assigned.

Qualifications for the Library Services Assistant include an Associate Degree in Library Technology or sixty general college credits plus at least three credits in each of the following: Library Administration, Selection of Materials, Reference, and Catalog and Classification.

Created April 24, 1996 (K. Scherkenbach)

COURT SERVICES ASSISTANT SERIES

This series includes positions in the Municipal Court responsible for providing information and assistance directly to the public, in person and over the telephone, regarding Court procedures as well as the disposition of cases, particularly those involving traffic citations reported too the Wisconsin Department of Transportation.

The job classifications included in this series are in the process of being developed.

(8/12/97)

LICENSE ASSISTANT SERIES

Positions in this series process license applications, fees, and other license-related documents. These positions have a significant amount of public contact within and outside of City government on matters pertaining to licensing.

The different levels of License Assistant are distinguished from each other by the complexity of licenses processed as well as responsibility for leading and training other License Assistants.

License Assistant I

The License Assistant I, while serving as the entry-level for the License Assistant series, is akin to advanced-level classifications in the City's Office Assistant series. Three to five years of experience as an Office Assistant II, or equivalent, are required for this level.'

License Assistant I positions typically process license applications, fees, Police, Health Department, and Building Inspection reports, insurance and bond certificates, and other required documents; assist applicants with license applications; respond to license-related telephone inquiries; update and maintain license records; prepare license lists for Common Council meetings and agendas for the Utilities and Licenses Committee; compose license-related letters and correspondence; and other similar duties.

Requirements: At least three years of clerical experience with a significant amount of experience working with the general public.

License Assistant II

The License Assistant II is distinguished from the I level by processing applications for the most difficult and complex licenses such as liquor licenses for businesses, taxicab licenses, licenses to transport handicapped and elderly individuals, and luxury limousine licenses. The employees in these positions are also responsible for training, assigning work, and answering questions from other License Assistants; handling special and other more difficult license-related requests and situations; preparing cash and other special reports; and other similar duties.

Requirements: Four years of clerical experience including at least two years of experience at the License Assistant I level or equivalent.

Created April 1, 1997 (D. Holland)

INVENTORY CONTROL SERIES

The Inventory Control Series includes positions which have responsibility for the procurement, maintenance and disbursement of stock. The general nature and level of responsibility associated with classifications in the inventory control series conforms to the following descriptions.

Inventory Control Assistant I

The Inventory Control Assistant I classification represents the first level of the series. It is desirable for persons entering this level to have a high school diploma or equivalent and be familiar with the operation of a stockroom. Individuals performing at this level will typically receive, check-in, arrange, store and disburse materials. The minor assembly, repair or preparation of items prior to disbursement may be required. Manual and automated recordkeeping is completed according to established guidelines. Individuals assist in the physical inventory of materials and may pick-up and deliver material. Individuals performing at this level notify a supervisor when stock reaches designated reorder points and will order stock items with preselected vendors. Work assignments are generally outlined by a supervisor.

Requirements: No specific requirement.

Inventory Control Assistant II

Work assignments at the Inventory Control Assistant II level are distinguished from the "I" level by the performance of more difficult assignments involving the exercise of independent judgement. Persons at the II level may monitor stock reorder points and initiate action to replenish stock as necessary. This level obtains and compares prices, selects vendors within predetermined guidelines, and completes required requisitions. Generally, the variety of items purchased is limited. Individuals at this level may provide selected information to management on inventory-related issues. May assist in training and monitoring of new employees.

Requirements: One year of experience performing duties related to this position.

Inventory Control Assistant III

The type of materials procured by individuals at the Inventory Control Assistant III level is what separates this classification from lower levels. Individuals at the III level assume responsibility for the procurement of a wide variety of both stock and non-stock items. Individuals independently investigate comparability, availability and pricing to make judgements and decisions regarding the purchase of items. Based upon levels of item usage, may recommend stock levels, additions and deletions, as well as provide management with additional inventory control-related information. Analyzes data as necessary.

Requirements: Three years of experience performing duties related to this position.

Inventory Control Assistant IV

Positions classified at the Inventory Control Assistant IV level act as group leaders in assigning, outlining, monitoring and approving the work of lower level personnel. Disciplinary action is typically limited to making recommendations to a higher supervisory position. Individuals at this level direct the flow of materials into and out of the stockroom and oversee daily operations. This includes the need to correct inventory-related problems identified by either stockroom personnel or by citizens, alderpersons and other city officials and follow-up as necessary.

Requirements: Five years of experience performing duties related to this position including at least two years of experience at or above the level of an Inventory Control Assistant II.

Created April 10, 1996 (K. Scherkenbach)

MICROCOMPUTER SERVICES ASSISTANT

This job classification includes those office support positions responsible for using, maintaining, and troubleshooting software and training others to use microcomputers. Employees filling these positions are expected to serve as inhouse experts regarding all microcomputer applications, including word processing, data bases, and spreadsheets. An important part of their job is to train others to use these applications. They also assist managers and professionals in identifying records and processes to be automated and design spreadsheets, data bases, and word processing applications in this effort. Microcomputer Services Assistants may also develop new reports and retrievals from mainframe terminals.

The minimum requirements for this job classification include five years of progressively responsible office work; working knowledge of the work processes associated with a department or specific operational area; significant knowledge of microcomputer applications and a basic understanding of network operations; ability to troubleshoot microcomputer network operations; and the ability to teach applications to others individually and in small groups.

The Microcomputer Services Assistant is the most basic "information systems" job" in City government. Job classifications from which employees could be promoted into this job classification include Office Assistant IV, Accounting Assistant II, Personnel Payroll Assistant II, Administrative Assistant II, and other positions allocated to Pay Range 445.

Current work assignments for this job classification include the Department of City Development, Health Department, Fire Department, and Infrastructure Division of the Department of Public Works.

Created March 20, 1997 (L. Sutherland)
Revised April 29, 1997 (L. Sutherland)

PURCHASING ASSISTANT SERIES

Positions in this series spend virtually all of the time performing a variety of clerical and administrative clerical duties in support of the purchasing function. Due to the fact that these positions function in an office environment, employees filling Purchasing Assistant positions do not customarily perform physical work associated with moving or transporting materials.

Purchasing Assistant I

The Purchasing Assistant I is the entry-level ("underfill") level for the Purchasing Assistant II classification. Typically, employees enter the series at this level and remain there until they have met the work experience requirements needed to be promoted to the "II" level.

Requirements: Two years of clerical experience performing duties related to this position.

Purchasing Assistant II

The Purchasing Assistant II classification is considered the fully experienced (journey) level of the series.

Obtains accurate quotes on commodities from vendors over the telephone or in the form of written bids relative to pricing, delivery dates, and other purchase terms, contacting departments for more complete descriptions of goods required, checking the status of requisitions and purchase orders with departments and with vendors, and gathering information in order to reconcile minor differences. Answers questions and assists departments, vendors and co-workers regarding purchasing and related processes. May work as part of a team in completing assignments. May make small dollar purchases and assist in researching and preparing specifications. May attend trade shows and seminars.

Requires a thorough knowledge of departmental policies and procedures. Prepares and processes paperwork and other documentation relative to purchasing activities. Composes routine correspondence to departments and vendors. Uses standard office equipment and software packages.

Requirements: Four years of clerical experience with at least six months of experience at the Purchasing Assistant I level or above. Job-related coursework may be substituted for up to six months of the experience requirement.

Purchasing Assistant III

The Purchasing Assistant III classification is differentiated from the "II" level by the performance of difficult or complex purchasing assignments and the addition of group leader responsibilities for lower level purchasing personnel. Typical duties include monitoring work flow to ensure uniformity of distribution among lower level personnel, solving problems related to the purchasing process, disseminating information, training staff in purchasing procedures and automation operations, and implementing and monitoring procedures related to clerical operations and use of computers.

Requirements: Four years of clerical experience with at least six months of experience at the Purchasing Assistant II level or above. Job-related coursework may be substituted for up to six months of the experience requirement.

Created April 10, 1996 (K. Scherkenbach)

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