

UCSF CLERICAL/ADMINISTRATIVE JOB EVALUATION MATRIX

FACTORS	Sr. Clerk	() Assistant I	() Assistant II	() Assistant III
Knowledge	Basic knowledge of general/standard clerical functions (, e.g., filing, telephones, photocopying); and of department policies and procedures.	Routine knowledge of several standard functions; standard organizational knowledge (e.g., payroll, purchasing, accounting); apply standard rules, regulations; ability to use standard work processing and related computer software packages.	Working knowledge of applicable University policies and procedures in all areas; basic and limited knowledge of the principles of a specialized field; thorough knowledge of office systems; ability to use a broad range of technology, systems and packages.	Comprehensive detailed knowledge of University administrative infrastructure, policies and procedures; entry level professional knowledge of a technical or professional field when such knowledge is used to complete a project or process.

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Independence	Close supervision; specific oral and/or written instructions are provided as guidelines; anything not covered by the specific guidelines is referred to supervisor; responsible for individual components of a process.	General supervision; responsible for multiple components of an administrative process; oral and/or written guidelines provided; apply wide variety of rules, regulations and procedures	Work independently with limited supervision; responsible for several complete administrative processes.	Authority for a unit to act on day-to-day administrative decisions with minimum supervision; work with general guidelines which may not be directly applicable or may not be clear; establish written procedures/ instructions when there are deviations from or changes in policy.

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Problem solving and decision making	Solve routine problems to complete a specific task; application of narrow, routine, and standard office methods.	Solve routine problems of a repetitive nature; resolution of factual information where there is a "right" answer or a precedent; use judgment to select means of doing a job from standard office methods; follows, but does not interpret guidelines.	Regular use of judgment and discretion to solve operational problems where answer is not apparent; select best solution from several "right" answers or no precedent; determines own schedules and work priorities; make suggestions for process improvement; interpret oral and/or written guidelines to solve problems.	Solve complex administrative problems (e.g., supervision, staffing, equipment, space); may exercise some originality to develop methods or procedures to resolve recurring or unusual problems; application of extensive understanding of program and activities; apply advanced knowledge and skills of University administrative infrastructure, policies and procedures.
FLSA Exemption Status	Non-exempt	Non-exempt	Non-exempt	Non-exempt
Benchmark education and experience	High school graduation/GED and 1 year of realted experience or an equivalent combination of	High school graduation/GED and 2 years of realted experience or an equivalent combination of	High school graduation/GED and 3 years of realted experience or an equivalent combination of	High school graduation/GED and 4 years of realted experience or an equivalent combination of

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Nature of work - Functional Examples				
General Administrative	Type/complete forms, form letters, labels, etc. Screen mail. Perform alpha and numeric filing. Answer telephones and exchange routine information.	Word process routine documents and correspondence using standard software. Maintain filing systems. Maintain routine calendars, schedule meetings, appointments and rooms. Greet visitors and exchange information.	Compose and respond to correspondence. Compile information for reports. Manage calendars and make logistical arrangements. Contribute to the development of administrative systems and processes. Resolve visitor issues using an understanding of appropriate University policies and procedures. May lead a specific administrative function or unit.	Prepare and edit correspondence for style and/or subject matter. Research and compile information and prepare reports. Coordinate complex scheduling and logistics for meetings, conferences and events. Answer non-routine and sensitive inquiries using knowledge and interpretation of University policies. Develop and recommend and implement administrative processes. May supervise and/or lead specific administrative functions and/or units.

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Accounting	Prepare routine forms.	Prepare wide variety of accounting forms; post to general ledger; responsible for accuracy; identify discrepancies.	Prepare and review forms, reconcile ledgers; identify discrepancies and make corrections applying knowledge of basic accounting principles; resolve problems by performing qualitative review of individual cases.	Supervise forms processing; entry level professional knowledge of basic accounting principles; may have responsibility for multiple accounts with special requirements; resolve non-routine problems.
Fiscal administration/ contracts and grants	Perform routine posting; review forms for accuracy and completeness; assist with basic processing functions.	Set up accounts; prepare files; assemble information; contribute to reports.	Monitor expenses; reconcile ledgers; prepare status reports; apply rules, regulations and past precedents.	Assist in preparing budget for contract and grant proposals; provide advice re: budget projections; monitor expenses for different agencies; transfer funds.

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Payroll	Prepare forms; verify information (e.g., account numbers).	Process limited variety of transactions for small staff; routine payroll actions; check on status of checks; process action to resolve discrepancies	Perform standard payroll activities; oversee preparation of payroll forms for non-routine payroll (e.g., shift differential, overtime, multiple contracts.)	Perform/supervise standard payroll & benefits activities; resolve non-routine problems; interpret policies & contracts; implement new campus policies & procedures.
Personnel	Prepare and complete forms.	Prepare and type forms, provide basic materials, check personnel forms for completeness, provide standard information on personnel policy/ procedures.	Perform a full range of processing for personnel actions; assist with new employee orientation; provide standard benefits information and review forms for completeness; resolve personnel processing problems; explain, personnel policies and procedures and refer non-routine inquiries to appropriate staff.	Lead or perform administrative personnel functions; apply policy and procedures recommending and implementing administrative changes for the unit/department; resolve non-routine and unusual personnel problems.

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Information systems	Enter formatted information into database screens.	Perform data entry utilizing some basic data content knowledge.	Operate software packages such as Excel, Access, Filemaker Pro and internal UC systems. Recognize and correct data irregularities. Set up routine computer procedures; resolve	Operate/maintain databases and software; troubleshoot problems; maintain and revise procedures and policies for interface with programs; run standard and ad