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Office of Personnel Management

Secretary Series

GS-0318

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Additional Available Guidance

See [Digest of Significant Classification Decisions & Opinions, Vol.1](#) and [Digest Vol. 6](#) for guidance on distinguishing between work situations A, B, and C. See [Digest Vol. 3](#) for guidance on identifying specialized clerical work. See [Digest Vol. 11](#) for guidance on type of work properly included in this series. See [Qual. Stds. Op. Manual](#) for definition of typing or stenography proficiency requirements.

**Workforce Compensation and Performance Service
Classification Programs Division
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Secretary Series

GS-0318

CONTENTS

SERIES DEFINITION	1
EXCLUSIONS	1
TITLES	2
OCCUPATIONAL INFORMATION	2
SUPERVISORY POSITIONS	5
GRADING OF POSITIONS	5
GRADE CONVERSION TABLE	6
FACTOR LEVEL DESCRIPTIONS	7
FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION	7
FACTOR 2, SUPERVISORY CONTROLS	11
FACTOR 3, GUIDELINES	15
FACTOR 4, COMPLEXITY	16
FACTOR 5, SCOPE AND EFFECT	17
FACTOR 6, PERSONAL CONTACTS	18
FACTOR 7, PURPOSE OF CONTACTS	20
FACTOR 8, PHYSICAL DEMANDS	20
FACTOR 9, WORK ENVIRONMENT	21
OPM BENCHMARK DESCRIPTIONS	21
SECRETARY (TYPING), GS-0318-03, BMK# 01	21
SECRETARY (TYPING), GS-0318-04, BMK# 01	23
SECRETARY (STENOGRAPHY), GS-0318-05 , BMK# 01	26
SECRETARY (TYPING), GS-0318-05, BMK# 02	29
SECRETARY (STENOGRAPHY), GS-0318-06, BMK# 01	32
SECRETARY (STENOGRAPHY), GS-0318-06, BMK# 02	36
SECRETARY (STENOGRAPHY), GS-0318-08, BMK# 01	43
SECRETARY (STENOGRAPHY), GS-0318-08, BMK# 02	47
SECRETARY (STENOGRAPHY), GS-0318-09, BMK# 01	53
EXPLANATORY MEMORANDUM	56
ENDNOTES	59

SERIES DEFINITION

This series includes all positions the duties of which are to assist one individual, and in some cases the subordinate staff of that individual, by performing general office work auxiliary to the work of the organization. To be included in this series, a position must be the principal office clerical or administrative support position in the office, operating independently of any other such position in the office. The duties require a knowledge of clerical and administrative procedures and requirements; various office skills; and the ability to apply such skills in a way that increases the effectiveness of others. The duties do not require a technical or professional knowledge of a specialized subject-matter area. (See Digest [Vol. 3](#) for guidance on what constitutes "specialized.")

This standard supersedes the standard for the Secretary Series, GS-0318, issued in May 1974.

EXCLUSIONS

Excluded from this series are the following kinds of positions:

1. Positions the primary duties of which are typing and associated clerical work, or typing from material dictated on recording media. Such positions are classified in the [Clerk-Typist Series, GS-0322](#).
2. Positions the primary duties of which are to perform stenography or reporting and associated clerical work. Such positions are classified in the [Clerk-Stenographer and Reporter Series, GS-0312](#).
3. Positions primarily involving performance of clerical work for which a specialized series has been established, such as the [Information Receptionist Series, GS-0304](#), [Mail and File Clerk Series, GS-0305](#), and [Correspondence Clerk Series, GS-0309](#).
4. Clerical, administrative, or other work where the primary duties are identified with an established subject-matter series and require knowledge which constitutes a basis for recruitment, retention, or other personnel management considerations, such as statistical clerk, mathematics aid, or personnel clerk. Such positions are classified in the appropriate subject-matter series.
5. Positions which involve clerical, administrative, or specialized support functions, but which do not serve as the principal clerical or administrative support position in an office may be classified in the [Miscellaneous Clerk and Assistant Series, GS-0303](#), the [Clerk-Typist Series, GS-0322](#), or the [Clerk-Stenographer and Reporter Series, GS-0312](#), when the work is not covered by an established specialized series as identified in exclusion numbers 3 and 4 above.

5. Positions which involve responsibility for providing or obtaining a variety of management services (for example, budget, personnel, management analysis, accounting) essential to the direction and operation of an organization when the paramount qualifications required are knowledge of management principles, practices, methods, and techniques. Such positions are classifiable to the [Administrative Officer Series, GS-0341](#).

TITLES

The title *Secretary* applies to all non-supervisory positions in this occupation.

The title *Supervisory Secretary* applies to positions in this series meeting the definition for supervisory positions contained in the [General Schedule Supervisory Guide](#).

The word "Typing" or "Stenography" is parenthetically added to the title of any position in this series when such a position includes a requirement for typing or stenography skills at or above the level of proficiency required under the competitive standard for entry level clerk-typist or clerk-stenographer positions. (See [Qual. Stds. Op. Manual](#) for definition of typing or stenography proficiency requirements.) Only one parenthetical title should be used for any one position. A parenthetical title should not be used when the work involving the skill is so infrequent or is performed under such circumstances that most or all persons who can perform the clerical work satisfactorily can also accomplish the stenographic or typing work in a reasonably adequate manner either immediately upon employment, after a reasonable period of experience on the job, or by use of some other technique or device to accomplish the work.

OCCUPATIONAL INFORMATION

(See [Digest Vol. 11](#) for guidance on type of work properly included in this series.)

Positions in this series exist for the purpose of increasing the effectiveness of others by performing as many office support duties as possible. This includes serving as the principal clerical and administrative support position in the immediate organizational unit in or for which the persons assisted have responsibility, by carrying out and coordinating all the clerical and day-to-day administrative support activities which are typically required to accomplish the work of the organization. The nature and variety of the activities depend on the needs of the organization served.

Secretaries perform numerous tasks which are dissimilar in kind, but which have in common the purpose of assisting the work of one or more persons in an organization. Because all of the individual tasks performed by secretaries are related to the work of the people they assist, there are unique opportunities available for secretaries to increase the scope of their position. That is, by using information and insight obtained in performing one task, secretaries can enlarge scope and effectiveness of their performance of others. There is also a special opportunity for secretaries and the people they support to build a mutual working relationship which results in a

secretary's acting and speaking for these individuals with an authority not common in other clerical positions.

The duties of a secretary are in some respects similar to those found in many of the specialized clerical series. Nevertheless, the value of these duties frequently cannot be evaluated by reference to the standards for the individual clerical series because the tasks, as performed by the secretary, are part of a broader and more inclusive responsibility which requires that the secretary be aware of virtually everything happening in the entire organization. The typical secretarial position requires a general knowledge of substantive work of the organization under the jurisdiction of the persons assisted and, as the secretary's participation in the management of the organization increases and as the nature and extent of that management effort increases through differences in the work situation, the amount of knowledge required increases accordingly. Positions at the lower grades consist primarily of clerical and procedural duties and, as positions increase in grade, administrative support functions are more predominant. At the higher levels, the secretary applies a very considerable knowledge of the organization, its objectives, and lines of communication.

Typical clerical and procedural duties of positions in this series include:

- providing telephone and receptionist services;
- maintaining records of leave and attendance;
- requisitioning office supplies, repairs on office equipment, and printing services;
- reserving rooms for meetings;
- filing material and maintaining office filing systems;
- receiving and controlling incoming correspondence;
- reviewing outgoing correspondence, reports, etc., for format, grammar, and punctuation, and removing typographical errors;
- writing simple or repetitive, non-technical correspondence such as letters of acknowledgment in accordance with a given format;
- performing typing, stenographic, or transcribing duties;
- keeping abreast of various procedural requirements, for example, procedures required to process travel vouchers;
- maintaining information needed for budget purposes.

Administrative support duties typically provided by secretaries include:

- making extensive travel arrangements;
- making complete arrangements for large conferences;
- composing complex, but non-technical correspondence;
- locating and assembling information for various reports, briefings, conferences, etc.;
- following up with staff members to insure that various commitments made at conferences and meetings are met;
- designing and organizing filing systems;
- planning and arranging the maintenance and preparation of information needed for budget reports;
- organizing the flow of clerical processes in the office and in subordinate offices.

These are only examples of work performed in this series. For a position to be included in this series, it is *not* necessary for it to include typing, stenography, or any other single duty. Positions in this series involve the performance and coordination of various duties, rather than performance of any one duty such as the preparation of a particular report or the processing of a particular kind of document.

The nature and extent of assistance provided by the secretary varies. There may be instances where the unit consists of one employee doing substantive work with the secretary working only for that one employee. In some organizations the secretary primarily assists the supervisor of the organization while providing limited assistance to members of the supervisor's staff. In other situations, positions may involve significant assistance to several staff members, usually the senior members in an organization, in addition to the supervisor. In organizations with a small staff, the secretary may assist all members. Because the nature of the work in this series involves, in varying degrees, all of the administrative and clerical functions of an office, secretaries provide some amount of assistance to everyone in the organization served. However, in all such cases the secretary serves as the principal clerk or administrative assistant to the head of the organizational unit. Therefore, there typically is no more than one secretary role possible in each organizational unit. The most common exception, of course, is where both a chief and a deputy each might have a bona-fide secretary position. Finally, it should be noted that a sole clerk is not necessarily a secretary; there must be a comprehensive range of clerical or administrative support duties to be performed.

Work assigned to secretary positions may range from very routine and procedural duties, such as providing receptionist, phone, and typing services, to very responsible work, such as developing information for use in large, complex, and critical conferences. Generally, a secretary can provide assistance in the more procedural aspects of general office work for several staff members without difficulty. There is no hard, fast rule as to the number of people a secretary can serve. However, the number of people to whom a secretary can provide higher level, more responsible assistance, is limited because of the demands such duties place on the secretary in terms of awareness of the activities, views, programs, and commitments of the person assisted. It is also unreasonable to expect a secretary to provide clerical support, e.g., typing, to a large number of people and at the same time provide higher level administrative support. The presence of high volume, routine business will almost invariably preclude performance of the higher level work.

SUPERVISORY POSITIONS

Some offices may have clerical employees, such as file clerks or typists, in addition to the secretary. As principal office assistant, the secretary may be responsible for assigning, reviewing, and coordinating the work of other clerical assistants in an organization. This kind of responsibility has been considered in the factor level descriptions for this series. Positions meeting the definition for supervisory positions contained in the [General Schedule Supervisory Guide](#) should be evaluated in accordance with that guide, and in accordance with this standard.

GRADING OF POSITIONS

Positions should be evaluated factor by factor using one or more of the comparable benchmarks or factor level descriptions, or both, for the Secretary Series. For some positions, one or more factors may fail to meet the lowest or exceed the highest level of that factor as described in this standard. Those factors should be evaluated through use of the [primary standard](#) for the factor evaluation system. More complete instructions for evaluating positions are contained in the [Instructions for the Factor Evaluation System](#).

EVALUATE EACH POSITION INDIVIDUALLY. No position should be placed in a particular grade simply because, "all branch secretaries are that grade." Even positions in the same echelon of the same organization may have very different duties and responsibilities.

Since positions in this series are responsible for increasing the effectiveness of others by performing clerical and administrative support duties, their grades are obviously affected by the kind and level of those available supportive duties. This absolutely does not mean that the grade of the position will necessarily vary with the grade or echelon of the supervisor. It does mean that supervisors with more difficult and complex supportive work to delegate will be able to support higher grades for secretary positions than supervisors with less difficult and complex supportive work to delegate.

Many positions include typing and stenographic duties. These duties will not normally determine the grade. However, if it appears that typing or stenography may be the grade determining work, refer to the [Typing and Stenographic Grade-Evaluation Guide](#).

Evaluating Secretaries to Deputies

When the top supervisor of an organization and the deputy each have a secretary, classifying the work of the deputy's secretary requires an especially careful evaluation. It is possible that the grades of the top supervisor's secretary and the deputy's secretary will be the same. However, the work of the deputy's secretary will usually be placed at a lower level under several factors, which will frequently affect the grade of the position. This is especially true for the first two factors.

In many circumstances, the assignment of the deputy will be sufficiently different from that of the office chief to warrant crediting the secretary's position at a lower level work situation than that applied to the office chief's secretary. This may result in a lower point level for Factor 1 than would apply to the secretary to the top supervisor.

In addition to the supervision received from the deputy, the deputy's secretary will usually receive direction from the top supervisor's secretary which may affect the level of Factor 2.

GRADE CONVERSION TABLE

Total points on all evaluation factors are converted to GS grades as follows:

Point Range	Grade	Point Range	Grade
255-450	GS-2	1605-1850	GS-8
455-650	GS-3	1855-2100	GS-9
655-850	GS-4	2105-2350	GS-10
855-1100	GS-5	2355-2750	GS-11
1105-1350	GS-6	2755-3150	GS-12
1355-1600	GS-7	3155-3600	GS-13

FACTOR LEVEL DESCRIPTIONS

This section defines the levels of the nine factors as they apply to the Secretary Series.

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

Factor 1 measures the nature and extent of information or facts which the secretary must understand to do acceptable work (e.g., steps, procedures, practices, rules, policies, principles, and concepts) and the nature and extent of the skills needed to apply those knowledges. To be used as a basis for selecting a level under this factor, a knowledge must be required and applied.

The same type of knowledge may be found at different point levels depending upon the extent of knowledge required. For this occupation the extent of knowledge required is related, in part, to the work situation in which the position is found.

Work situation refers to the complexity of the organization served (i.e., the immediate office in which the secretary works, and any subordinate offices) which affects the extent of office rules, procedures, operations, and priorities the secretary must apply to maintain a proper and smooth flow of work within the organization and between organizations.

This standard defines four basic types of knowledge required and three basic types of work situations.

Knowledge Type I -- Assign Level 1-2 (200 points) regardless of work situation:

Knowledge of basic or commonly used rules, procedures, or operations which typically require some previous experience or training. For example, this level is appropriate for positions providing routine receptionist, typing, timekeeping, correspondence control, and filing services for an office. Some examples of knowledge commonly found at this level include:

- general knowledge of the office routine and procedures sufficient, for example, to receive and refer phone calls and visitors to staff members;
- knowledge of a range of common clerical practices and procedures sufficient, for example, to file material and obtain requested data from files;
- knowledge of grammar, spelling, punctuation, and required formats sufficient to recognize and correct such errors in correspondence and reports.

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- knowledge of grammar, spelling, punctuation, and required formats sufficient to recognize and correct such errors in correspondence and reports.

Knowledge Type II -- Assign Level 1-3 (350 points) regardless of work situation:

In addition to Type I knowledges, positions at this level require knowledge of an extensive body of rules, procedures, or operations applied to clerical assignments, and knowledge of the organization and functions of the office in order to perform all of the procedural work of the office. This includes knowledge to carry out and coordinate, in a timely and effective manner, many different procedures, each of which might involve numerous steps, such as all of those needed to:

- obtain and monitor a full range of office support services such as printing, maintenance, and supply services. This requires knowledge of the procedures applicable to the control, authorization, securing, and justification of such services;
- request various types of personnel training actions or services;
- prepare a wide variety of recurring internal reports and documents from information obtained from the staff, files, and other sources.

This level may also include the knowledge required to advise clerks or secretaries in subordinate organizations of the appropriate procedures to use.

Knowledge Type III -- Assign:

Level 1-3 (350 points) in combination with Work Situation A;

Level 1-4 (550 points) in combination with Work Situation B;

Level 1-5 (750 points) in combination with Work Situation C.

In addition to Type II knowledges, positions at this level require knowledge of the duties, priorities, commitments, policies, and program goals of the staff sufficient to perform non-routine assignments such as: independently noting and following-up on commitments made at meetings and conferences by staff members; shifting clerical staff in subordinate offices to take care of fluctuating workloads; or locating and summarizing information from files and documents when this requires recognizing which information is or is not relevant to the problem at hand.

At this level, the secretary is fully responsible for coordinating the work of the office with the work of other offices, and for recognizing the need for such coordination in various circumstances. This may include advising secretaries in subordinate organizations concerning such matters as the information to be provided by the subordinate organizations for use in conferences or reports.

Knowledge Type IV -- Assign:

Level 1-5 (750 points) in combination with Work Situation B;

Level 1-6 (950 points) in combination with Work Situation C.

(Note: Work Situation A does not permit application of Knowledge Type IV. Work Situation B rarely involves application of Knowledge Type IV.)

In addition to the knowledges and skills required at the lower levels, employees at this level must have as a continuing requirement:

-- A basic foundation of administrative concepts, principles, and practices sufficient to perform independently such duties as eliminating conflict and duplication in extensive office procedures; determining when new procedures are needed systematically studying and evaluating new office machines and recommending acceptance or rejection of their use; studying the clerical activities of the office and subordinate offices and recommending a specific restructuring of the way activities are carried out. The presence of these knowledges is shown by skills such as:

- skill in adapting policies or procedures to emergency situations and establishing practices or procedures to meet new situations; and
- skill in recognizing how and when certain policies, procedures, or guidelines will be confusing to others;

AND

A comprehensive knowledge of the supervisor's policies and views on all significant matters affecting the organization that would enable the secretary to perform duties such as:

- developing material for supervisor's use in public speaking engagements. After ascertaining subject matter, develops background information and prepares outline for speech; submits outline to the supervisor or the supervisor's subordinate for final writing;
- briefing or advising staff members or persons outside the organization on supervisor's views on current issues facing the organization, e.g., supervisor feels that a proposed reorganization would increase the effectiveness of the program because it reduces some administrative burdens.

Work Situation A

(See [Digest Vol. 1](#), [Digest Vol. 6](#), and [Explanatory Memorandum](#) for guidance on Work Situation identity.)

These organizations are small and of limited complexity. Although the organization may include several subordinate sections or subgroups, the employee's supervisor directs the staff primarily through face-to-face meetings, and internal procedural and administrative controls are simple and informal. Within the supervisor's organization, there are few complicated problems of coordination requiring formal procedures and controls for adequate solution.

Work Situation B

The staff is organized into subordinate segments which may in turn be further divided. Direction of the staff is exercised through intermediate supervisors, and the subordinate groups differ from each other in such aspects as subject matter, functions, relationships with other organizations, and administrative requirements in ways that place demands upon the secretary that are significantly greater than those described Work Situation A. The presence of subordinate supervisors does not by itself mean that Work Situation B applies. (For example, a processing or records organization divided into several units, each performing identical work, would not meet the definition of Work Situation B.)

There is a system of formal internal procedures and administrative controls, and a formal production or progress reporting system. Coordination among subordinate units is sufficiently complex to require continuous attention.

Also at this level are organizations described as Work Situation A in terms of internal coordination when they have extensive responsibility for coordinating work outside of the organization. Such organizations may be placed in Work Situation B when the responsibility for coordination of work outside the organization requires procedures and administrative controls equivalent to those described above for this level.

Work Situation C

In addition to conditions described in Work Situation B, staffs of organizations in this situation are augmented by various staff specialists in such fields as personnel, management analysis, and administration. The organization is typically divided into three or more subordinate levels¹ with several organizations at each level. In addition, such organizations typically have one of the following (or equivalent) conditions which increase the knowledge required by the work:

1. The program is interlocked on a direct and continuing basis with the programs of other departments, agencies, or organizations, requiring constant attention to extensive formal clearances and procedural controls.

2. The program is directly affected by conditions outside the organization which vary widely in nature and intensity, and which frequently require organizational, procedural, or program adjustments in the supervisor's organization.
3. There is active and extensive public interest or participation in the program which results in the supervisor spending a substantial portion of the time in personal contacts such as those with citizens groups, professional societies, the media, educational groups, officials of State or local governments, or community leaders.

FACTOR 2, SUPERVISORY CONTROLS

This factor covers the nature and extent of direct or indirect controls exercised by the supervisor, the secretary's responsibility, and the review of completed work. Controls are exercised by the supervisor in the way assignments are made, instructions are given, priorities and deadlines are set, and objectives and boundaries are defined. The responsibility of the secretary depends upon the extent to which the supervisor expects the secretary to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing priorities and defining objectives. The degree of review of completed work depends upon the nature and extent of the review, e.g., close and detailed review of each phase of the assignment; detailed review of the finished assignment; spot-check of finished work for accuracy; or review only for adherence to policy.

Supervisory controls over secretaries may be exercised by the head of the organization served and, in part, through direction provided by secretaries at higher echelons, or occasionally by other staff members. For the sake of editorial simplicity, the term "supervisor" in the following factor level descriptions may refer to any one of these sources of supervision.

The level determination under this factor should be based on the same duties that served as the basis for the level determination under Factor 1.

Level 2-1 -- 25 points

For both one-of-a-kind and routine tasks, the supervisor provides specific assignments that are accompanied by detailed and specific instructions.

The secretary works as instructed and consults with the supervisor as needed on all matters not specifically covered in the original instructions.

The work is closely controlled, either by the structured nature of the work itself or by the supervisor's review which may include checking progress or reviewing completed work for accuracy, adequacy, and adherence to instructions or procedures.

Level 2-2 -- 125 points

The supervisor provides assignments, indicating generally what is to be done, quantity expected, deadlines, and priority of assignments. The supervisor provides additional, specific instructions for new, difficult, or unusual assignments including suggested work methods or advice on the availability of source materials.

The secretary uses initiative in carrying out the recurring work of the office independently, referring only problems and unfamiliar situations not covered by instructions to the supervisor for help. For example, the employee performs the following duties in accordance with established procedures:

- receives and refers phone calls; personally answers routine questions, such as those concerning standard office procedures;
- reviews outgoing correspondence for procedural, grammatical, and typographical accuracy;
- maintains control records on incoming correspondence and action documents; notifies staff member when due date is near to insure timely reply;
- searches for and obtains information in files on request.

The supervisor assures that finished work is accurate and in compliance with instructions and established procedures.

Level 2-3 -- 275 points

The supervisor defines the overall objectives and priorities of the work in the office and assists the secretary with some special assignments. The secretary plans and carries out the work of the office and handles problems and deviations in accordance with established instructions, priorities, policies, commitments and program goals of the supervisor, and accepted practices in the occupation. For example, the secretary:

- receives telephone calls and visitors, screening those which can be handled without the supervisor's help. At this level, the secretary personally takes care of many matters and questions including answering substantive questions not requiring technical knowledge;
- keeps the supervisor's calendar, schedules appointments and conferences without prior approval, and sees that the supervisor is fully briefed on the matters to be considered before the scheduled meeting;

-- receives requests for information concerning the organization's programs which can be assembled from the record based on a knowledge of the organization, advises when the material can be furnished, and prepares it personally or follows up to see that it is prepared by the staff within the specified time;

-- based upon the information provided by the supervisor concerning the purpose of the conference and people to attend, makes necessary arrangements for conferences, including space, time, contacting people, and other matters; assembles background material for the supervisor; attends the meetings; and reports on the proceedings;

-- receives and reads incoming correspondence and reports, screening those items which can be handled personally, forwarding the rest to the supervisor or the staff. Actions taken personally include:

- drafting replies to general inquiries not requiring a technical knowledge of the program; and
- relaying instructions to subordinate offices, collecting data, preparing reports for higher echelons, or otherwise acting on requests received concerning procedural or administrative requirements.

-- Reads outgoing correspondence for procedural and grammatical accuracy, conformance with general policy, factual correctness, and adequacy of treatment; advises the writer of any deviations or inadequacies;

-- Assists supervisor's subordinates in the procedural aspects of expediting the work of the office, including such matters as shifting clerical help in subordinate offices to take care of fluctuating workload; helping supervisor's subordinates to implement supervisor's instructions concerning procedures; explaining reporting requirements and arranging with subordinate officials for the collection and submission of data; and assembling data into general reports of the total work of the office;

-- Signs routine correspondence of a non-technical nature in the supervisor's name or in own name as secretary to the supervisor.

The methods used by the incumbent are almost never reviewed in detail. Completed work is evaluated by adequacy, appropriateness, and conformance to established policy. By its very nature, much of the work cannot be reviewed in detail.

Level 2-4 -- 450 points

The supervisor sets the overall objectives of the work. The secretary and the supervisor, in consultation, develop the deadlines and the work to be done.

At this level, the secretary handles a wide variety of situations and conflicts requiring use of initiative to determine the approach to be taken or methods to use. This level is most likely to be found in organizations of such size and scope that many complex office problems arise which cannot be brought to the attention of the supervisor. For example:

- The secretary notes the commitments made by the supervisor during the meetings, informs the staff of those commitments, and arranges for the staff to implement them;
- When reviewing correspondence for the supervisor's signature, the secretary calls the writer's attention to any conflict reflected in the file or any departure from policies and attempts to resolve conflict before matter is presented to supervisor;
- In addition to arranging conferences as described at the lower level, the secretary at this level may decide to arrange for a subordinate of the supervisor to represent the organization at a conference. Such decisions would be based on a knowledge of the supervisor's views;
- The secretary drafts letters of acknowledgment, commendation, notification, etc., when the need arises; e.g., a secretary whose supervisor makes it a practice to acknowledge all commendatory remarks concerning the organization's program in periodicals, publications, or speeches, may review publications for such remarks and prepare appropriate letters for the supervisor's signature;
- The secretary insures that all official social obligations are met, arranges luncheons, issues invitations, insures proper seating arrangements, and insures that all details are covered, (e.g., that guest speakers are invited sufficiently in advance, and adequate provisions are made for protocol requirements). When necessary, the secretary settles accounts with the restaurant, club, or caterer;
- The secretary obtains information, the sources of which are not initially known and which may be available in only one or very few places. Subject matter is generally specialized and not a matter of widespread knowledge or is complicated because it is scattered in numerous documents or only in the memories of a few employees. Frequently the information is obtained orally from a variety of sources. The employee organizes the material and draws attention to the most important parts;

-- Using personal initiative, the employee observes need for administrative or procedural notices or instructions to the staff, prepares the necessary issuances, and presents them for signature or signs them personally. The employee devises and installs office procedures.

Completed work is reviewed only for overall effectiveness.

FACTOR 3, GUIDELINES

This factor covers the nature of guidelines and the judgment needed to apply them. Guides used in this occupation include, for example, reference materials such as dictionaries and style manuals, agency instructions concerning correspondence, and operating procedures of the organization served.

Individuals jobs vary in the specificity, applicability, and availability of the guidelines for performance of assignments. Consequently, the constraints and judgmental demands placed upon secretaries also vary. For example, the existence of specific instructions, procedures, and policies may limit the opportunity of the secretary to make or recommend decisions or actions. However, secretaries may use considerable judgment in applying generally stated policies or objectives to individual cases.

Level 3-1 -- 25 points

Specific, detailed guidelines cover the work, and the secretary works in strict adherence to them. Guidelines include dictionaries, style manuals, agency instructions governing time and leave, correspondence and handling of classified information, and operating procedures of the office. Assignments are made in a way that leaves no doubt as to which guide applies.

Level 3-2 -- 125 points

Guidelines typically include dictionaries; style manuals; agency instructions concerning such matters as correspondence, or the handling of classified information; and operating policies of the supervisor or organization served.

The secretary locates and selects the appropriate guidelines, references, and procedures for application to specific cases, referring situations to which the existing guidelines cannot be applied or significant proposed deviations to the supervisor. The secretary may also determine which of established alternatives to use.

Level 3-3 -- 275 points

Guidelines include a large body of unwritten policies, precedents, and practices which are not completely applicable to the work or are not specific and which deal with matters relating to judgment, efficiency, and relative priorities rather than with procedural concerns.

For example, they may include decisions made by the supervisor in cases that are similar, but not completely analogous. The secretary applies and adapts guidelines, such as regulations or the supervisor's policies, to specific problems for which the guidelines are not clearly applicable.

FACTOR 4, COMPLEXITY

This factor covers the nature, number, variety, and intricacy of tasks, steps, processes, or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

Level 4-1 -- 25 points

The work consists of a few clear-cut tasks. The secretary typically provides typing or stenographic services, maintains simple office files, sorts mail into a few categories, and refers phone calls and visitors to staff members.

There is little choice in deciding what needs to be done or when it should be done. Work is performed either as it arrives or in an order set by someone else.

Actions to be taken are readily discernible, e.g., phone calls are simply referred to the requested staff member; otherwise, the secretary requests assistance.

Level 4-2 -- 75 points

The work consists of duties that involve various related steps, processes, or methods. In addition to duties as varied as those described at level 4-1, secretaries at this level perform a full range of procedural duties in support of the office, including such duties as requisitioning supplies, printing, or maintenance service; filling out various travel forms for staff members; arranging for meeting rooms; and preparing scheduled reports from information readily available in the files.

Decisions regarding what needs to be done involve various choices requiring the secretary to recognize the existence of and differences among clearly recognizable situations.

Actions to be taken or responses to be made differ in such things as the sources of information, the kind of transactions or entries, or other readily verifiable differences. Decisions at this level

are based on a knowledge of the procedural requirements of the work coupled with an awareness of the specific functions and staff assignments of the office.

Level 4-3 -- 150 points

The work includes various duties involving different and unrelated processes and methods. For example, in addition to duties described at levels 4-1 and 4-2, the secretary performs a number of duties comparable to the following:

- prepare one-of-a-kind reports from information in various documents when this requires reading correspondence and reports to identify relevant items, and when decisions are based on a familiarity with the issues involved and the relationships between the various types of information; and

- set up conferences requiring the planning and arranging of travel and hotel accommodations for conference participants when this is based on a knowledge of the schedules and commitments of the participants.

Decisions regarding what needs to be done, and how to accomplish them, are based on the secretary's knowledge of the duties, priorities, commitments, policies, and program goals of the supervisor and staff, and involve analysis of the subject, phase, or issues involved in each assignment. The chosen courses are selected from many alternatives.

FACTOR 5, SCOPE AND EFFECT

Scope and Effect covers the relationship between the nature of the work, i.e., the purpose, breadth, and depth of the assignment, and the effect of work products or services both within and outside the organization.

In this occupation, effect measures such things as whether the work output facilitates the work of others, provides timely services of a personal nature, or affects the adequacy of systems of clerical and administrative support. Effect alone does not provide sufficient information to properly understand and evaluate the impact of the position. The scope of the work completes the picture, allowing consistent evaluations. Only the effect of properly performed work is to be considered.

Level 5-1 -- 25 points

The purpose of the assignment is the performance of routine operations involving a few tasks or procedures. At this level, the secretary typically provides typing or stenography services, maintains time and leave records for the organization, maintains the office files, and refers phone calls and visitors to staff members. The work has little impact beyond the immediate organization.

Level 5-2 -- 75 points

At this level, the purpose of the work is to carry out specific procedures. The work affects the accuracy and reliability of further processes.

Duties frequently appearing at this level include:

- serving as liaison between the supervisor and subordinate units;
- consolidating reports submitted by subordinate units;
- arranging meetings involving staff from outside the immediate office.

Level 5-3 -- 150 points

Positions at this level serve offices that clearly and directly affect a wide range of agency activities, operations in other agencies, or a large segment of the public or business community. The secretary at this level modifies and devises methods and procedures that significantly and consistently affect the accomplishment of the mission of the office. The secretary identifies and resolves various problems and situations that affect the orderly and efficient flow of work in transactions with parties outside the organization.

FACTOR 6, PERSONAL CONTACTS

This factor includes face-to-face telephone contacts with persons not in the supervisory chain. (NOTE: Personal contacts with supervisors are covered under Factor 2, Supervisory Controls.) Levels described under this factor are based on what is required to make the initial contact, the difficulty of communicating with those contacted, and the setting in which the contact takes place (e.g., the degree to which the employee and those contacted recognize their relative roles and authorities).

Above the lowest level, points should be credited under this factor only for contacts which are essential for successful performance of the work and which have a demonstrable impact on the difficulty and responsibility of the work performed.

The relationship between Factors 6 and 7 presumes that the same contacts will be evaluated for both factors. Therefore, use the personal contacts which serve as the basis for the level selected for Factor 7, as the basis for selecting a level for Factor 6.

Level 6-1 -- 10 points

The personal contacts are with employees within the immediate organization, office, project or work unit, or in related units involved in functions similar to that of unit served; in support units, for example, a messenger service; or employees in other offices with whom contacts are so frequent and close that they are comparable to contacts made in the same office, e.g., the contacts a division office secretary might have with employees in the bureau office immediately over the division.

AND/OR

The contacts are with members of the general public in very highly structured situations (e.g., the purpose of the contact and the question of with whom to deal are relatively clear). A typical contact might include receiving visitors to the office who have appointments with other staff members.

Level 6-2 -- 25 points

The personal contacts are with employees in the same agency, but outside the immediate organization. People contacted generally are engaged in different functions, missions, and kinds of work, e.g., representatives from various levels within the agency such as headquarters, regional, district, or field offices, or other operating offices in the immediate installation;

AND/OR

The contacts are with members of the general public, as individuals or groups, in a moderately structured setting (e.g., the contacts are generally established on a routine basis, usually at the employee's work place; the exact purpose of the contact is frequently unclear at first to one or more of the parties; and one or more of the parties may be uninformed concerning the role and authority of the other participants).

Contacts at this level are typically found in offices where visitors and callers contact the office, or are contacted by the office for several different purposes, to find several different kinds of information, or to receive one of several different services. Regardless of the purpose of the contact as described under Factor 7 (i.e., to exchange information or coordinate work), this requires the secretary to clarify first why the caller or visitor is in contact with the office.

Level 6-3 -- 60 points

The personal contacts are with individuals or groups from outside the employing agency in a moderately unstructured setting, for example, the contacts are not established on a routine basis, requiring the secretary to identify and locate the appropriate person to contact or to apply

significant skill and knowledge in determining to whom a telephone call or visitor should be directed; the purpose and extent of each contact is different, and the role and authority of each party is identified and developed during the course of the contact. Typical contacts at this level might include people in their capacities as attorneys, contractors, or representatives of professional organizations, the news media, or public action groups when the office deals with them on a variety of issues.

Level 6-4 -- 110 points

The personal contacts are with high-ranking officials from outside the employing agency at national or international levels in highly unstructured settings (e.g., contacts are characterized by problems such as: the officials may be relatively inaccessible; arrangements may have to be made for accompanying staff members; appointments may have to be made well in advance; each party may be very unclear as to the role and authority of the other; and each contact may be conducted under different ground rules).

Typical contacts at this level might include Members of Congress, leading representatives of foreign governments, presidents of large, national or international firms, nationally recognized representatives of the news media, presidents of national unions, State governors, or mayors of large cities.

FACTOR 7, PURPOSE OF CONTACTS

In this occupation, purpose of personal contacts may range from factual exchanges of information to resolving problems affecting the efficient operation of the office. The personal contacts which serve as the basis for the level selected for this factor must be the same as the contacts which are the basis for the level selected for Factor 6.

Level 7-1 -- 20 points

The purpose is to obtain, clarify, or give facts or information directly related to the work, for example, exchanging information when providing telephone and receptionist service and informing staff members of their leave balances.

Level 7-2 -- 50 points

The purpose of the secretary's work is to plan, coordinate, or advise on work efforts or to resolve operating problems. Typical duties normally evaluated at this level include; insuring that reports and responses to correspondence are submitted by the staff on time and in the proper format, making travel arrangements, and scheduling conferences.

FACTOR 8, PHYSICAL DEMANDS

This factor covers the requirements and physical demands placed on the employee by the work assignment. This includes physical characteristics and abilities (e.g., specific agility and dexterity requirements) and the physical exertion involved in the work (e.g., climbing, lifting, pushing, balancing, stooping, kneeling, crouching, crawling, or reaching). To some extent the frequency or intensity of physical exertion must also be considered, e.g., a job requiring prolonged standing involves more physical exertion than a job requiring intermittent standing.

NOTE: Regulations governing pay for irregular or intermittent duty involving unusual physical hardship or hazard are in subpart I of part 550 of title 5, Code of Federal Regulations.

Level 8-1 -- 5 points

The work is sedentary. Typically, the employee may sit comfortably to do the work. However, there may be some walking; standing; bending; carrying of light items such as papers, books, small parts; driving an automobile, etc. No special physical demands are required to perform the work.

FACTOR 9, WORK ENVIRONMENT

This factor considers the risks and discomforts in the employee's physical surroundings or the nature of the work assigned and the safety regulations required. Although the use of safety precautions can practically eliminate a certain danger or discomfort, such situations typically place additional demands upon the employee in carrying out safety regulations and techniques.

NOTE: Regulations governing pay for irregular or intermittent duty involving unusual physical hardship or hazard are in subpart I of part 550 of title 5, Code of Federal Regulations.

Level 9-1 -- 5 points

The work environment involves everyday risks or discomforts which require normal safety precautions typical of such places as offices, meeting and training rooms, libraries, and residences or commercial vehicles, e.g., use of safe work practices with office equipment, avoidance of trips and falls, observance of fire regulations and traffic signals, etc. The work area is adequately lighted, heated, and ventilated.

OPM BENCHMARK DESCRIPTIONS

SECRETARY (TYPING), GS-0318-03, BMK# 01

Duties

The incumbent serves as the principal clerical assistant in an office, performing various clerical tasks in accordance with established procedures.

- Maintains established office files and records. Obtains data requested by other employees in the unit.
- Receives and refers visitors and telephone calls. Distributes mail and messages, recording the receipt, suspense, and completion dates as appropriate.
- Types narrative and tabular material from rough draft or revised typed draft. Types memoranda, reports, view graphs, and similar material in accordance with established guidelines for review by originators. Corrects grammatical and spelling errors in drafts.

Factor 1. Knowledge Required by the Position -- Level 1-2 -- 200 points

Knowledge Type I

- Knowledge of the unit's organization and function sufficient to refer visitors, telephone calls, and mail by specific name request or request by a specific functional area.
- Knowledge of clerical procedures and forms used in the organization.
- Knowledge of spelling, punctuation, and syntax sufficient to identify and correct grammatical errors and type materials in final form.
- Skill in operating typewriter. A qualified typist is required.

Factor 2. Supervisory Controls -- Level 2-2 -- 125 points

The supervisor assigns clerical duties to be performed and advises the secretary of changes or revisions in established procedures. Originators provide instructions for new or unusual typing assignments.

Duties are performed within the framework of established procedures. The incumbent is expected to seek guidance on problems or unfamiliar situations.

Work is reviewed for completeness and adherence to instructions and procedures. Typing work is reviewed for accuracy.

Factor 3. Guidelines -- Level 3-2 -- 125 points

Guidelines include detailed procedures specified in manuals and established instructions. Style manuals and regulations pertaining to typing work are readily available.

The employee exercises judgment in determining which of the approved guidelines, references, or procedures are most appropriate to specific cases. Situations requiring significant deviations from established methods are referred to the supervisor or a senior clerk.

Factor 4. Complexity -- Level 4-1 -- 25 points

The duties performed are primarily routine, clear-cut tasks. Actions to be taken are normally readily discernible; when they are not, the secretary asks for help.

Factor 5. Scope and Effect -- Level 5-1 -- 25 points

The purpose of the work is to perform routine operations involving a few tasks or procedures.

The effect of the work is primarily limited to the organizational unit where the position is located. For example, the typing work performed facilitates the work of the originators of the material.

Factor 6. Personal Contacts -- Level 6-1 -- 10 points

The employee's contacts are primarily within the immediate organizational unit.

Factor 7. Purpose of Contacts -- Level 7-1 -- 20 points

Contacts are for the purpose of exchanging information such as information relating to the progress of assignments and to receive instructions.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The work is sedentary in nature. No unusual physical demands are placed upon the employee.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The work is performed in a typical office setting.

TOTAL POINTS -- 540

SECRETARY (TYPING), GS-0318-04, BMK# 01*Duties*

Performs various clerical support and typing duties for the chief of a regional supply division and the staff.

- Receives and files correspondence, records, and reports. Maintains file plans and checks subordinate unit files for proper disposition. Receives and files changes to regulatory publications.
- Maintains employee record cards for personnel within the division.
- Receives incoming correspondence, screening material prior to distribution for suspense dates, establishing controls, and following up for division chief.
- Receives visitors and phone calls to the division office, ascertaining the nature of requests and directing callers to appropriate staff, or personally providing the information desired when routine or procedural matters of the office are involved.
- Types from voice recordings dictated by the division chief, the assistant division chief, and others in the organization. Types correspondence, reports, and similar material.
- Reviews correspondence prepared for the division chief. Checks for spelling, typographical errors, conformance to formats and procedural requirements.
- Requisitions office supplies, equipment, and publications, and performs similar office maintenance duties.
- Schedules appointments and makes arrangements for time, participants, and location of meetings in accordance with instructions from the supervisor.

Factor 1. Knowledge Required by the Position -- Level 1-3 -- 350 points

Knowledge Type II

- Knowledge of the organizational functions and procedures of the supply division to perform such duties as distribute and control mail, refer phone calls and visitors, and provide general, non-technical information.
- Knowledge of the office filing system and various references and handbooks commonly used by the staff in order to classify, search for, and dispose of materials.

- Knowledge of procedures required to requisition office supplies, maintenance, and printing services. This requires knowledge of the procedures applicable to the control, authorization, securing, and justification of such services.
- Knowledge of procedures required to maintain leave records of division staff and to prepare forms required for various personnel actions.
- Skill in operating a typewriter. A qualified typist is required.
- Knowledge of grammar, spelling, punctuation, and required formats.

Work Situation A

The division is of limited organizational complexity and is divided into three subordinate units. The chief directs the staff primarily through face-to-face meetings. Internal procedures and administrative controls are simple and informal.

Factor 2. Supervisory Controls -- Level 2-2 -- 125 points

The supervisor provides assignments, generally indicating what is to be done, quantity expected, deadlines, and priorities. Additional instructions are provided for new, difficult, or unusual assignments.

Employee uses initiative to perform independently recurring office work. Work is performed as it arrives, or in accordance with established priorities and instructions. Only problems and unfamiliar situations not covered by instructions are referred to supervisor.

The supervisor assures that finished work is accurate and in compliance with instructions and established procedures.

Factor 3. Guidelines -- Level 3-2 -- 125 points

Administrative instructions and manuals provide specific guidance for duties such as the preparation of time and attendance reports and the maintenance of office files. Also, sample letters and correspondence manuals usually provide detailed guidelines.

The employee uses judgment in selecting the most appropriate guidelines for application to specific cases. For example, the employee selects the most appropriate correspondence format

when more than one is authorized, determines subject matter for classification of file materials, and selects procedures for routing correspondence or requests for action by determining nature of correspondence or requests.

Factor 4. Complexity -- Level 4-2 -- 75 points

The clerical duties performed include the full range of procedural duties in support of the office. Decisions regarding what needs to be done generally involve choice among established alternatives.

Actions to be taken and responses to be made primarily concern differences in factual situations and awareness of functional specialties of the staff members.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The purpose of the work is to provide clerical support for the division office. The work has direct effect on the clerical support provided in subordinate units within the division.

Factor 6. Personal Contacts -- Level 6-2 -- 25 points

Most contacts are with employees within the immediate organization, vendors, and offices serviced by the division.

Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points

The contacts are to exchange information and to plan and coordinate work efforts so that, for example, the staff submits reports and replies to correspondence promptly, and meetings are scheduled at mutually convenient times.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

Most of the work is performed while seated. Occasionally the employee must lift computer printouts weighing from 10 to 20 pounds.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The work is performed in a typical office setting.

TOTAL POINTS -- 835

[Main Menu](#) [Exit](#)

SECRETARY (STENOGRAPHY), GS-0318-05 , BMK# 01*Duties:*

This position is located in the Systems Engineering Branch, an organization which provides guidance, control, and direction to avionic system and subsystem efforts, and which defines requirements for equipment developments to satisfy future subsystem needs.

The incumbent participates actively in the management of the Systems Engineering Branch office by performing routine administrative and miscellaneous clerical work. Based on a good working knowledge of the organization and substantive programs under the supervisor's control, the incumbent resolves problems associated with the administrative and clerical work of the office. Within this basic structure the incumbent performs the following duties:

- Receives calls, greets visitors, and directs to staff members only those contacts needing their attention or action. Takes care of routing matters, and on the basis of knowledge of the programs or operations, refers other inquiries to appropriate personnel. Incumbent personally responds to routine and nontechnical requests for information such as status of reports, duty status of engineers and technicians, suspense date for matters requiring compliance, and similar information readily available from the files. Places both local and long distance calls for personnel. Maintains Branch Chief's calendar and schedules appointments based on knowledge of Branch Chief's interest and commitments.
- Composes correspondence on administrative support or clerical functions of the office. Composes routine correspondence on other subjects as outlined in regulations and procedures or specifically requested by Branch Chief. Reads outgoing correspondence for procedural and grammatical accuracy.
- Receives and reviews classified and unclassified mail for the Branch. Determines which items should be brought to the attention of the Branch Chief as opposed to those that should be sent directly to other appropriate personnel for action. Reviews outgoing mail for attachments, dates, signature, complete addresses, and destinations. Maintains suspense records on all correspondence and action documents and follows up to ensure a timely reply or action.
- Takes and transcribes dictation of correspondence, reports, and telephone conversations involving both technical and specialized terminology. Notes are often typed in final form without rough draft, reviewed for proper arrangement and grammar, and compiled in final form. Types an intermediate draft when requested. Uses reference sources such as technical dictionaries and assures proper arrangement, grammatical accuracy, and spelling of the final copy.

- Prepares in final form all types of documentation and forms incident to branch personnel administration and office management. Prepares travel requests and all associated actions and documentation. Assembles, prepares, and submits branch reports of staff time charges, and maintains personnel time cards.
- Reads directives and instructional material pertaining to administrative practices and clerical procedures in order to be aware of new, revised, or amended procedures for such matters as preparation and processing of correspondence, engineering reports, and forms; filing; mail procedures; preparation of travel vouchers; and security procedures.
- From rough draft, notes, or oral instructions, types correspondence, forms, reports, and specifications including a wide variety of technical terminology. Responsible for proper spelling, grammar, format, and arrangement of material.
- Performs periodic inventory of classified documents within the Branch. Arranges for the destruction of classified material.
- Provides guidance and assistance on applicable procedures, instructions, and regulations to other clerical personnel assigned to the Branch.

Factor 1. Knowledge Required -- Level 1-3 -- 350 points

Knowledge Type III

- Knowledge of the substantive programs of the Systems Engineering Branch as they relate to the clerical and administrative functions of the Branch.
- Skill in taking and transcribing dictation. A qualified stenographer is required.
- Knowledge of the duties, commitments, goals, and priorities of Branch staff to advise other clerical support personnel on such matters as the application of instructions and regulations and their effect on the work of the staff.
- Knowledge of spelling, arrangement, grammar, and required formats.
- Skill in operating a typewriter. A qualified typist is required.

Work Situation A

This Branch includes 17 professional engineering and support positions. Internal procedures are simple and informal, and the Branch Chief usually coordinates the work through face-to-face discussions with the staff.

Factor 2. Supervisory Controls -- Level 2-3 -- 275 points

Supervisor issues work assignments in terms of general instructions and desired results. The secretary plans and carries out duties independently.

The supervisor gives a spot check review of completed work to ensure compliance with established policies and procedures.

Factor 3. Guidelines -- Level 3-2 -- 125 points

Specific guidelines are available as needed for reference purposes. They include technical dictionaries, directives pertaining to administrative practices and clerical procedures, security regulations, correspondence manuals, and prescribed filing systems. Incumbent uses judgment in selecting guidelines for application to individual cases.

Factor 4. Complexity -- Level 4-2 -- 75 points

The work consists of duties involving several related sequential steps, processes, and methods.

Decisions made by secretary in performing the work require recognizing the differences among a few easily recognizable situations.

Differences in actions taken and responses made by secretary depend on the source of information, type of transaction, or other factual matters.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The purpose of the position is to relieve the supervisor of the routine administrative and miscellaneous clerical work. The work affects the accuracy and reliability of further processes.

Factor 6. Personal Contacts -- Level 6-2 -- 25 points

Personal contacts include visitors from other offices within the agency.

Factor 7. Purpose of Personal Contacts -- Level 7-2 -- 50 points

The incumbent plans and coordinates the work of the office. This includes contacts for purposes such as clarifying or exchanging information, scheduling and arranging meetings, making travel arrangements, and providing other Branch employees with guidance and help on applicable procedures.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The work places no special physical demands on the employee. The work includes some walking, standing, bending, and carrying of light items such as paper and books.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The work environment involves the normal risks and discomforts typical of an office.

TOTAL POINTS -- 985

SECRETARY (TYPING), GS-0318-05, BMK# 02

Duties

The incumbent assists the Chief of the Executive Personnel Division.

- Controls all incoming correspondence and action documents. Reads all incoming correspondence, screens items to be handled personally, and forwards the remainder to staff for action.
- Maintains files and records such as candidate files, executive inventory files, executive training files, and logs showing the status of recruiting actions and correspondence. Ensures that files include all required documents and that all documents are properly signed.
- Receives requests for information, advises when the information can be furnished, and provides it personally from files and records or follows up with staff to see that it is provided.
- Drafts responses such as routine requests from candidates for supergrade positions for more information concerning arrangements for employment interviews or the proper procedures for applying for a position. Also drafts letters to Department executives notifying them of assignments for training at the Federal Executive Institute or Bookings Institute.
- Receives visitors to the office including all appointments for executive recruiters. This involves setting up appointments, securing building clearance, and arranging for additional appointments with bureau and office senior staff. Occasionally includes arranging airline scheduling and hotel accommodations for out-of-town candidates for positions with the Department.
- Arranges for large meetings or conferences including selecting mutually satisfactory time, reserving meeting rooms, notifying participants, attending the meetings, and preparing reports of the proceedings.

- Arranges travel for staff, including scheduling transportation making hotel reservations, keeping in touch with staff en route, and preparing travel vouchers.
- Completes forms required for executive recruiting and training actions.
- Types correspondence, reports, and records in final form from rough drafts. Ensures correct punctuation, capitalization, spelling, grammar, and conformance to style.

Factor 1. Knowledge Required by the Position -- Level 1-3 -- 350 points

Knowledge Type III

- Knowledge of the work program of the office sufficient to screen requests for information, personally provide authorized information from files and records or advise on established procedures (such as those for employment interviews), and refer non-routine requests to the appropriate staff member.
- Knowledge of the duties, priorities, and commitments of the staff sufficient to independently set up large conferences, arrange travel and accommodations for those attending, and prepare reports of the proceedings.
- Skill in operating a typewriter. A qualified typist is required.
- Knowledge of correct grammar, spelling, punctuation, capitalization, and style.

Work Situation A

The Executive Personnel Division includes from three to five specialists providing executive recruiting and development services for the Department. The supervisor directs the staff through face-to-face meetings. Formal controls are largely limited to records concerning the status of correspondence and recruiting actions.

Factor 2. Supervisory Controls -- Level 2-3 -- 275 points

The supervisor defines the major priorities of the office and explains special assignments. The incumbent plans and carries out the day-to-day work of the office independently, referring only very unusual office problems to the supervisor or other staff. Much of the work cannot be reviewed in detail. The supervisory review is to ensure that the work of the office is processed promptly and completely in accordance with established priorities.

Factor 3. Guidelines -- Level 3-2 -- 125 points

Guides include office instructions concerning such matters as correspondence format and controls, the format and content of files such as executive inventory files, and processing travel vouchers. Guides also include standing, unwritten instructions concerning such matters as which member of the staff will handle various assignments.

The incumbent is responsible for knowing which guide applies, referring problems to the supervisor when they clearly are not covered by existing guides.

Factor 4. Complexity -- Level 4-2 -- 75 points

Employee performs full range of procedural duties in support of the office, including such duties as arranging travel and conferences for staff and providing or following-up on requests for information. Decisions regarding what needs to be done involve various choices requiring the secretary to recognize the existence of and differences among clearly recognizable situations.

Actions to be taken or responses to be made differ in such things as the sources of information, the kind of transactions or entries, or other readily verifiable differences.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The purpose of the work is to carry out specific procedures. The work affects the accuracy and reliability of further processes.

Factor 6. Personal Contacts -- Level 6-2 -- 25 points

Contacts are with employees at all levels within the Department and with candidates for Department supergrade positions.

Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points

Contacts are to give and obtain information; to set up meetings or arrange travel; and to ensure that correspondence, reports, and recruiting cases are completed within deadlines.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

No special physical qualifications are required to perform the work. The work requires the ability to move around the office and carry light items such as office files.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The work is performed in offices and meeting rooms.

TOTAL POINTS -- 985

SECRETARY (STENOGRAPHY), GS-0318-06, BMK# 01*Duties*

The incumbent assists the Director and Deputy Director of the Aerospace Power Division of a propulsion laboratory. The incumbent:

-- Receives all visitors and telephone calls to the Director or Deputy Director. Ascertains nature of call or business of visitors and determines appropriate action. Refers important business and high ranking visitors to Director or Deputy Director; when that is not practical, takes messages for their attention or makes later appointments for visitors. Refers business requiring engineering or scientifically qualified response to the appropriate branch or technical area within the organization. The incumbent is authorized to give out administrative and readily available scientific information to callers upon determination of their right to receive it.

-- Keeps the Director's calendar and schedules appointments and meetings upon own initiative based upon personal knowledge of Director's workload and current issues of importance. Reminds supervisor of appointments and briefs supervisor on the matters to be considered before the scheduled meeting. On own initiative reschedules appointments when it becomes apparent that supervisor will not be able to meet previous schedules.

-- Responds to requests for information concerning Division functions. Personally prepares responses on schedule from source material. Anticipates need for information and systematically prepares material so that it is immediately available for supervisor's needs. In the absence of the Division Director or Deputy Director, in cases that would normally receive their personal attention, assumes responsibility for ensuring that requests for action or information are made known to responsible Division personnel or laboratory staff personnel who can satisfy the request. Follows up on required actions and informs the Director of their status. When the Division Director is absent but accessible, decides whether important or emergency matters should be brought to the Director's attention.

-- Arranges for conferences, including such matters as location, schedule, agenda, and attendance list. Assembles background material for the Director.

-- Reads incoming correspondence, publications, regulations, and directives which may affect the Division. Determines those that can be acted upon personally and takes necessary action. When necessary, uses initiative to obtain clarification of instructions from originating offices or appropriate focal points. Determines which are of importance or interest to the Division Director or Deputy and refers them accordingly. In other cases, prepares on own initiative, a digest of content for assistance of Division Director or the Deputy. Determines those that affect subordinate echelons of the Division and, on own initiative, ensures that chiefs of these organizations are informed. Assists them and their secretaries in interpreting instructions and

in establishing action required of them. Briefs Division Director on such activity, its results, and status.

-- Maintains control records on incoming correspondence and action documents and follows up on work in process to insure timely reply or action.

-- Reviews documents prepared for signature of or requiring coordination by the Division Director for conformance with regulations, grammar, format, and special policies of the Division. Returns such communications to originator for correction when not in conformance with known policies, or when correspondence regulations have not been followed. Advises and instructs subordinate offices through discussions with author or stenographer to obtain higher degree of compliance with general Division policies and correspondence regulations.

-- Assists supervisor's subordinates in the procedural aspects of expediting the work of the office, including distributing the workload of clerical help to take care of fluctuating workload; explaining report requirements and arranging for submission of data to be assembled by the incumbent into general reports; and informing and instructing stenographic and clerical personnel concerning procedures for preparation of correspondence.

-- Signs routine correspondence of a non-technical nature in supervisor's name or in own name.

-- Makes necessary arrangements for travel, arranging schedules of visits, making reservations, notifying organizations and officials to be visited, and submitting travel vouchers and reports.

-- Takes personal, telephone, or conference dictation. As senior stenographer in the Division, is called upon to take dictation at those conferences which are the most complex or involve matters of extreme priority due to policy or rank of personnel attending, or involve issues where great discretion is required.

-- Stimulates submission of technical items for topical reports, news releases, and briefings. Independently corrects and edits these items for submission to the staff office designated as the laboratory collection point.

-- Serves as Office Security Advisor for the Division. Conducts quarterly security meetings and circulates security directives pertinent to the security procedures of the Division.

Factor 1. Knowledge Required -- Level 1-4 -- 550 points

Knowledge Type III

- Knowledge of the duties, priorities, commitments, policies, and program goals of the staff sufficient to perform assignments such as reviewing publications, directives, and other materials which may affect the division and taking appropriate follow-up action; and to anticipate and prepare materials Director needs in order to respond to correspondence or phone calls.
- Knowledge of the substantive programs of the Division as related to the Division's clerical and administrative support functions.
- Knowledge and skill to coordinate the work of the office with other offices, including advising secretaries in subordinate offices on new procedures or regulations, and on information to be provided for use in conferences or reports.
- Skill in taking and transcribing dictation. A qualified stenographer is required.
- Knowledge of grammar, spelling, punctuation, and required formats.

Work Situation B

The Division has a formalized system of internal procedures including extensive reporting requirements. Coordination of the subordinate units and projects is difficult to maintain. The Division includes 95 positions performing research and development work in three branches. Each branch is further subdivided. The Division plans, formulates, manages, and executes advanced development programs in the areas of electric propulsion, non-propulsion power for flight vehicles, and power for extraterrestrial sites.

Factor 2. Supervisory Controls -- Level 2-3 -- 275 points

The incumbent works under the general supervision of the Director and accepts individual assignments from the Deputy Director. The supervisor sets priorities and deadlines for some specific assignments. The incumbent plans and carries out the assignments in accordance with the established policies and practices of the office. Priorities and deadlines for the day-to-day workflow of the office are set by the incumbent based on a knowledge of the overall functions and projects of the Division.

Factor 3. Guidelines -- Level 3-2 -- 125 points

Guides include dictionaries, style manuals, and agency instructions concerning such matters as correspondence, time and leave regulations, and the handling of classified information.

- Knowledge of the duties, priorities, commitments, policies, and program goals of the staff sufficient to perform assignments such as reviewing publications, directives, and other materials which may affect the division and taking appropriate follow-up action; and to anticipate and prepare materials Director needs in order to respond to correspondence or phone calls.
- Knowledge of the substantive programs of the Division as related to the Division's clerical and administrative support functions.
- Knowledge and skill to coordinate the work of the office with other offices, including advising secretaries in subordinate offices on new procedures or regulations, and on information to be provided for use in conferences or reports.
- Skill in taking and transcribing dictation. A qualified stenographer is required.
- Knowledge of grammar, spelling, punctuation, and required formats.

Work Situation B

The Division has a formalized system of internal procedures including extensive reporting requirements. Coordination of the subordinate units and projects is difficult to maintain. The Division includes 95 positions performing research and development work in three branches. Each branch is further subdivided. The Division plans, formulates, manages, and executes advanced development programs in the areas of electric propulsion, non-propulsion power for flight vehicles, and power for extraterrestrial sites.

Factor 2. Supervisory Controls -- Level 2-3 -- 275 points

The incumbent works under the general supervision of the Director and accepts individual assignments from the Deputy Director. The supervisor sets priorities and deadlines for some specific assignments. The incumbent plans and carries out the assignments in accordance with the established policies and practices of the office. Priorities and deadlines for the day-to-day workflow of the office are set by the incumbent based on a knowledge of the overall functions and projects of the Division.

Factor 3. Guidelines -- Level 3-2 -- 125 points

Guides include dictionaries, style manuals, and agency instructions concerning such matters as correspondence, time and leave regulations, and the handling of classified information.

Duties

The incumbent assists the Chief, Audit Division of a District Internal Revenue Service Office by relieving the Chief of clerical and administrative support work such as:

- Receiving telephone calls and visitors, referring callers directly to supervisor, or redirecting them to more appropriate offices in Audit or other divisions.
- Assisting in implementing supervisor's intentions by explaining reporting requirements to subordinates and arranging for timely submission of required information.
- Receiving and controlling mail routing items directly to the appropriate Audit Division offices for action, assembling background information before routing mail to the supervisor, and notifying the supervisor of pending delays and their reasons.
- Reviewing outgoing correspondence for signature of the supervisor and the District Director for proper format, conformance with procedural instructions, grammar, typographical accuracy, and necessary attachments.
- Searching for, assembling, and summarizing information as required from files and documents as requested by the supervisor or in anticipation of the supervisor's needs.
 - Arranging for meetings, including making reservations for meeting rooms and notifying all participants.
 - Advising individuals concerned when appointments must be rescheduled, arranging mutually convenient times for new appointments, and informing the supervisor of pending appointments, meetings, and other commitments.
 - Making travel arrangements for supervisor and staff, contacting travelers enroute to relay information, and typing various travel vouchers and reports.
 - Providing advice to secretaries in subordinate branches concerning such matters as time and leave procedures, travel vouchers, and reporting and correspondence procedures.
 - Organizing and maintaining files and records, manuals, handbooks, and other related materials. Maintaining personnel listings of all Audit Division employees.
 - Taking and transcribing dictation in final form, editing material when necessary.
 - Serving as timekeeper for personnel in the Audit Division office.

Factor 1. Knowledge Required -- Level 1-4 -- 550 points

Knowledge Type III

- Knowledge of the duties, priorities, commitments, policies, and program goals of the Division chief and staff to perform nonroutine assignments such as locating and summarizing information from files and documents as required or in anticipation of supervisor's needs.
- Skill in advising secretaries in subordinate units concerning such matters as the application of various procedures and reporting requirements to the units.
- Skill in taking and transcribing dictation. A qualified stenographer is required.
- Skill in operating a typewriter.
- Knowledge of grammar, spelling, punctuation, and required formats.

Work Situation B

The Audit Division includes several hundred employees and is divided into branches which are, in turn, divided into subordinate units. The Division has a complex set of formal internal procedures.

Factor 2. Supervisory Controls -- Level 2-3 -- 275 points

The supervisor provides assignments; determines the objectives, priorities, and deadlines; and assists the incumbent with unusual situations. The incumbent plans and carries out the work, handling problems and deviations in the work assignment in accordance with policies, previous training, or accepted office practices.

Completed work is evaluated for appropriateness, soundness, and conformance to policy and requirements. Although some technical review may be performed, the methods used to achieve the end results usually are not reviewed in detail.

Factor 3. Guidelines -- Level 3-2 -- 125 points

Procedures for doing the work have been established and specific guidelines are available as needed for reference purposes. Guidelines include dictionaries, style manuals, agency instructions concerning such matters as correspondence procedures or time and leave regulations, and the operating policies of the Division Chief.

The secretary uses judgment in locating and selecting the appropriate guidelines, references, and procedures for application to specific cases, referring significant deviations or situations to which existing guidelines cannot be applied to the supervisor. The employee also determines which of established alternatives to use.

Factor 4. Complexity -- Level 4-2 -- 75 points

The secretary performs a full range of clerical and administrative support functions for the office, including arranging for travel and meetings, and assembling reports. Decisions regarding what needs to be done require the secretary to recognize differences among clearly recognizable situations. Actions to be taken or responses to be made differ in such things as the sources of information or the kinds of transactions or entries. Decisions at this level are based on a knowledge of the procedural requirements of the work coupled with an awareness of the specific functions and staff assignments of the office.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The incumbent ensures that the clerical and administrative portions of the Division Chief's work are accomplished effectively, allowing the Division Chief to concentrate on technical and managerial duties. The effectiveness of the branches and units is affected by the degree to which the Division Office runs smoothly.

Factor 6. Personal Contacts -- Level 6-2 -- 25 points

Contacts are primarily with employees within the Division and with other IRS employees in the district office engaged in different kinds of work. Contacts may also include members of the general public seeking information on various tax matters.

Factor 7. Purpose of Personal Contacts -- Level 7-2 -- 50 points

The incumbent plans and coordinates the clerical and administrative work of the office.

Factor 8. Physical Requirements -- Level 8-1 -- 5 points

The work is sedentary. The work requires sitting, walking, standing, bending, and carrying light items such as books, papers, and files.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The incumbent works in an office.

TOTAL POINTS -- 1185

SECRETARY (STENOGRAPHY), GS-0318-07, BMK# 01

Duties

The incumbent provides assistance to a Chief of Staff who directs one of two divisions in a large hospital. The Division is divided into 17 professional services, some of which are further subdivided. The incumbent:

-- Screens calls and visitors to the Chief of Staff's office, referring to staff members and forwarding to the Chief only those calls or visitors requiring the Chief's attention. Schedules appointments and makes commitments for the Chief to attend meetings, luncheons, etc., without prior approval. Personally handles many requests for information and resolves or assists in resolving a variety of complaints made by patients and their families.

-- On visits made to the Division by the Hospital Director and Assistant Hospital Director, assists them in placing telephone calls, receives visiting dignitaries, and performs other duties as requested by them.

-- Reads all incoming correspondence, determining proper action, at times preparing answers before referring to the Chief of Staff. Reviews outgoing correspondence and reports prepared by professional services under the auspices of the Chief of Staff, ensuring proper format, mathematical correctness, correct grammatical content, and ascertaining that all necessary coordination of facts has been completed and is in accordance with established policy.

-- Takes and transcribes all dictation for the Chief of Staff. Takes and transcribes minutes of the weekly Hospital Medical Executive Committee meetings, coordinating information and preparing folders of material to be discussed for each member of the committee. Dictation taken in the office of the Chief of Staff and at meetings is often confidential and frequently includes medical terminology.

-- Prepares authorization for fee-basis medical services performed on patients, insuring that requests are properly executed and justified, and that the service requested cannot be performed on the station. Coordinates with the Travel Unit to ensure that patients encounter no inconvenience. Prepares authorizations for payment after services have been rendered and submits them to Fiscal office for payment. Maintains records and the budget allotted to the Chief of Staff's office for this purpose. Handles requests for fee-basis laboratory work which come through the Chief of Staff for approval.

-- Assists in preparing necessary forms for consultant and attending physicians' visits for this division. Assists in monthly preparation of time cards for the consultant and attending staff,

determining payments and maintaining visit statistics and records for cost centers for easy reference for reports. Responsible for budget accounts allotted to the Chief of Staff's office.

-- Explains to service chiefs non-technical policies and procedures promulgated by the Chief of Staff or Hospital Director's office after obtaining clarification from source. Makes recommendations and decisions in establishing priorities among actions on administrative matters requested by the various professional services.

-- Maintains time cards for the Chief of Staff and other offices of the division. Receives time cards of the professional service chiefs for signature in the Chief of Staff's office.

-- Prepares worksheet and types Chief of Staff's evaluations on proficiency ratings of professional service chiefs under the jurisdiction of the Chief of Staff.

-- Dispatches minutes of the Hospital Medical Executive Committee, Research and Education Committee, staff appointments, and other pertinent material to hospital's Deans' Committee members prior to their monthly meetings.

-- Instructs and assists the various secretaries in the professional service offices on procedural matters such as the correct procedures to follow in preparing correspondence.

-- Prepares correspondence for the signature of the Chief of Staff and maintains records and files for same. Prepares and distributes monthly, the list of staff physicians, residents, and interns on duty at this division. Coordinates and prepares the monthly Admitting Officer of the Day schedule. Maintains a schedule of activities, conferences, and meetings held in the Hospital Director's conference room at this division. Sets up conferences for the Chief of Staff's Office, establishing mutual times, etc. Upon request, writes reports of contact made with Central Office.

-- Makes airline and hotel reservations for trips taken by the Chief of Staff, coordinating travel, types itinerary, etc.

Factor 1. Knowledge Required -- Level 1-4 -- 550 points

Knowledge Type III

-- Knowledge of the substantive programs of the hospital as they relate to the clerical and administrative support functions of the Division.

-- Knowledge of the duties, priorities, commitments, and program goals of the division to shift clerical staff in subordinate offices to respond to fluctuating workloads and to advise

secretaries in the professional services offices on preparing correspondence, requirements for various reports, and interpreting new instructions and procedures.

- Skill in taking and transcribing dictation. A qualified stenographer is required.
- Skill in operating a typewriter.
- Knowledge of grammar, spelling, punctuation, and required formats.

Work Situation B

The Division is divided into 17 professional services, each of which may be further subdivided. The Division has extensive internal procedures and reporting systems.

Factor 2. Supervisory Controls -- Level 2-3 -- 275 points

The incumbent works under the supervision of the Chief of Staff, making commitments for the chief with regard to established policies. When matters are questionable or professional decisions must be made, they are always referred to the supervisor. The Chief of Staff spends considerable time away from the office; the incumbent must therefore work independently. The incumbent plans and carries out the work, handling problems and deviations in the assignment in accordance with established policies.

Factor 3. Guidelines -- Level 3-3 -- 275 points

Guidelines typically include dictionaries, style manuals, and agency instructions concerning such matters as correspondence, time and leave regulations, and the handling of classified information; and the operating policies of the Chief of Staff and the Division.

Interpretation and adaptation of the guidelines to specific problems are frequently required, for example, in determining priorities and in resolving complaints. The incumbent instructs and assists secretaries in subordinate organizations with these problems.

Factor 4. Complexity -- Level 4-3 -- 150 points

Assignments involve making decisions on what needs to be done and how it should be done based on the programs, goals, priorities, and commitments of the Chief of Staff and the Division. The chosen course of action may have to be selected from many alternatives.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The incumbent ensures that the clerical and administrative portions of the Chief of Staff's work are accomplished effectively in accordance with established procedures, allowing the Chief to concentrate on professional and managerial duties. The degree to which the Division office operates smoothly affects the quality of clerical and administrative support for the Division's professional services.

Factor 6. Personal Contacts -- Level 6-2 -- 25 points

Personal contacts are with members of the hospital staff, members of the general public, and staff people of two universities directly affiliated with the hospital.

Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points

The incumbent coordinates the clerical and administrative work of the office. Although the contacts often require tact and diplomacy, the persons dealt with are usually working toward mutual goals and have cooperative attitudes.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The incumbent's work requires some walking, standing, bending, and carrying light items such as books and papers.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The work includes the everyday risks and discomforts typical of offices and meeting rooms.

TOTAL POINTS -- 1410

SECRETARY (STENOGRAPHY), GS-0318-08, BMK# 01*Duties*

The incumbent provides clerical and administrative assistance to the Commanding Officer of an aero propulsion laboratory. The incumbent:

-- Receives all visitors and telephone calls to the Commander. Determines nature of call or business of visitors. If business requires the attention of engineering or scientifically qualified personnel, decides whether the importance of business, rank, or position of visitor is such as to require personal attention of the Laboratory Commander, or if the visitor should be referred to the appropriate division concerned with the engineering or scientific subject. Incumbent is authorized to give out administrative and scientific information to callers upon determination of their right to receive it. When calls involve matters on which the Commander will require background information, tactfully postpones the conversation, obtains the required information, and presents the information when informing the Commander of the pending call.

-- Controls the Commander's activities schedule and reminds the Commander of appointments. On own initiative and discretion, establishes priorities, sets up, reschedules, or refuses appointments, accepts or declines invitations to meetings, and arranges for representation by a subordinate official when that is desirable.

-- Serves as buffer and acts as liaison between the Commander and the Division and Staff personnel by providing accurate, timely advice on procedures, reports, requirements, and other matters necessary to implement the Commander's policies, directives, and instructions. Informs them of the Commander's views on current issues and programs and schedules briefings by members of the staff for the Commander.

-- Reviews correspondence and documents prepared for signature of or requiring coordination by the Commander for conformance with regulations, grammar, format, and special policies of the Laboratory. On own initiative, returns such communications to the originator for correction when not in conformance with known policies or correspondence regulations. Gives advice and instructions to subordinate offices through discussions with author or stenographer to obtain higher degree of compliance with general laboratory policies and correspondence regulations.

-- In the absence of the Commander, the incumbent assumes responsibility for ensuring that requests for action or information, which would normally receive the Commander's attention, are made known to responsible division or laboratory staff personnel who can satisfy the request. Monitors resulting activities for the purpose of briefing the Commander. Decides whether important or emergency matters should be brought to the Commander's attention when the Commander is absent, but accessible.

-- Reads incoming publications, regulations, and directives which may be important to the activities of the Commander or members of the staff. Refers those of importance or interest to the Commander.

-- Receives requests from other organizations within the agency for information concerning programs under the Commander's control. From available background data, assembles requested information or follows up to see that subordinates in the Laboratory submit required answers within the specified time.

-- Composes correspondence on own initiative, based on a knowledge of Commander's views and desires. Typical subjects include administrative matters, letters of acknowledgment, general office and laboratory policies, acceptance of invitations, and cancellation of conferences. Signs correspondence for the Commander in the Commander's absence when technical or policy content has previously been cleared. Prepares regular and special records such as attendance, leave, degree of use of filing space, and amount of classified material present in the offices. Prepares similar paper work to ease the flow of work through the office and provides the Commander with current information in readily accessible form.

-- Makes all necessary arrangements for travel, arranging schedule of visits, making transportation and hotel reservations, notifying organizations and officials to be visited, keeping in touch with the Commander en route, writing thank-you letters after the Commander's return, and submitting travel vouchers and reports.

-- Takes and transcribes dictation. Such dictation includes engineering and scientific terminology in such fields as physics, aeronautics, and electronics. Transcribes dictation into letters, endorsements, messages, office instructions, and reports, with responsibility for sentence structure, grammar, and spelling. Writes resumes of conferences and gives copies to participants who are expected to take action as result of conferences. On own initiative, follows up on projects resulting from conferences to insure that schedules are met and reports progress to the Commander.

Factor 1. Knowledge Required -- Level 1-4 -- 550 points

Knowledge Type III

- Sufficient knowledge of the substantive programs of the organization and of the goals, priorities, policies, and commitments of the Commander to perform such tasks as assembling information to be used for reports or responses to inquiries, to compose correspondence not requiring a technical knowledge, and to maintain awareness of the clerical and administrative problems related to Laboratory programs.
- Skill in advising and instructing subordinate offices concerning the required reporting and general clerical and administrative procedures of the Laboratory.
- Skill in taking and transcribing dictation. A qualified stenographer is required.
- Skill in operating a typewriter.
- Knowledge of grammar, spelling, punctuation, and required formats.

Work Situation B

The Laboratory includes 450 employees in four offices and five divisions. The divisions are subdivided into two to four branches which are in turn subdivided. The Commander directs the work of the Laboratory through approximately 50 subordinate supervisors, and formal policies, procedures, and reporting requirements are necessary. The Laboratory is responsible for numerous research and development projects in the areas of advanced propulsion, fuels and lubricants, flight vehicle power, site support power, and associated areas.

Factor 2. Supervisory Controls -- Level 2-4 -- 450 points

The incumbent works under the general supervision of the Laboratory Commander who sets the overall objectives of the work, and from time-to-time, gives specific assignments with a brief explanation of the assignment's purpose. The incumbent personally sets the deadlines for most of the work to be done. The incumbent performs the duties of the job independently, referring only the most complex problems to the Commander. Many situations and conflicts arise which require the secretary to determine the approach to resolve them. The work is reviewed to ensure that the overall objectives of the position are met.

Factor 3. Guidelines -- Level 3-3 -- 275 points

Written procedural guidelines and general policy guidelines, both written and unwritten, are available, but the application of the guidelines often leaves much to the judgment of the incumbent. The incumbent uses judgment to interpret and adapt guidelines in specific situations.

Factor 4. Complexity -- Level 4-3 -- 150 points

The incumbent coordinates and controls clerical and administrative work, not only in the immediate office, but in a significant number of subordinate offices. Decisions regarding what needs to be done require analysis of subject matter, phase, or issues involved in each assignment, e.g., assembling information for various reports requiring identification of relevant information from files and other sources.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The incumbent ensures that the clerical and administrative controls and procedures of the Laboratory are properly applied. The work affects the accuracy and reliability of the work of subordinate units.

Level 6. Personal Contacts -- Level 6-3 -- 60 points

Contacts include high level officials both within the agency and from other agencies.

Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points

The incumbent plans and coordinates the work of the office, including resolution of clerical and administrative problems.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The work is sedentary.

Factor 9. Work Environments -- Level 9-1 -- 5 points

The work is performed in an office environment.

TOTAL POINTS -- 1620

SECRETARY (STENOGRAPHY), GS-0318-08, BMK# 02*Duties*

The incumbent assists the District Director of a large district office for the Internal Revenue Service. The incumbent:

- Receives telephone calls and visitors for the Director; determines which calls can be answered personally and which should be directed elsewhere. Obtains needed background information before referring calls to the Director.
- Maintains the appointment schedule for the Director, making final commitments, referring matters to staff members when appropriate, and advising the Director of appointments and other commitments which might have a bearing on future decisions.
- Arranges for travel by the Director and the staff, arranges schedule of visits, secures travel and hotel reservations, and prepares travel vouchers and reports from travel diaries.
- Advises the Director of important office matters arising during the Director's absence and brings the Director's attention to significant items in reports, files, and correspondence.
- Arranges meetings; including space, time, and staff. Assembles background material for agenda items and informs participants of topics to be discussed.
- Receives and reviews all incoming mail, establishing controls on certain items. Routes mail to divisions, retaining items of special importance for the personal attention of the Director. Attaches previous correspondence and other background information to incoming correspondence. Searches files for information to be used in replies, or requests information from the divisions. If information is readily available, the incumbent composes replies for the Director, signing correspondence for the Director when the content is in accordance with the Director's wishes. Reviews all correspondence for the Director's signature for grammar, construction, format, attachments, continuity of text, and compliance with the Director's viewpoint. Advises writer of inadequacies.
- As confidential assistant, establishes and maintains the Director's personal file of correspondence and documents concerning pending investigations, subordinate personnel, effectiveness reports, and similar subjects. Safeguards and maintains register of classified material.
- Advises division and branch secretaries on administrative and procedural requirements and instructions. Shifts clerical staff in subordinate units to accommodate fluctuating workloads.

Factor 3. Guidelines -- Level 3-3 -- 275 points

Written procedural guidelines and general policy guidelines, both written and unwritten, are available, but the application of the guidelines often leaves much to the judgment of the incumbent. The incumbent uses judgment to interpret and adapt guidelines in specific situations.

Factor 4. Complexity -- Level 4-3 -- 150 points

The incumbent coordinates and controls clerical and administrative work, not only in the immediate office, but in a significant number of subordinate offices. Decisions regarding what needs to be done require analysis of subject matter, phase, or issues involved in each assignment, e.g., assembling information for various reports requiring identification of relevant information from files and other sources.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The incumbent ensures that the clerical and administrative controls and procedures of the Laboratory are properly applied. The work affects the accuracy and reliability of the work of subordinate units.

Level 6. Personal Contacts -- Level 6-3 -- 60 points

Contacts include high level officials both within the agency and from other agencies.

Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points

The incumbent plans and coordinates the work of the office, including resolution of clerical and administrative problems.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The work is sedentary.

Factor 9. Work Environments -- Level 9-1 -- 5 points

The work is performed in an office environment.

TOTAL POINTS -- 1620

The incumbent must identify and understand the interrelationships between the various procedures and controls, between the various operations of the District Office, and between the operations of the office and the various public and private groups interested in those operations.

Decisions regarding what needs to be done are based on secretary's knowledge of the policies, priorities, and goals of the Director and the staff.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The incumbent ensures that the clerical and administrative portions of the Director's work are accomplished effectively, allowing the Director to concentrate on professional and managerial duties. The effectiveness of the divisions, branches, and units is affected by the degree to which the Director's office runs smoothly.

Factor 6. Personal Contacts -- Level 6-3 -- 60 points

Phone calls and visits to the District Director include those by Federal, State, national, regional, or local officials; business executives; members of the press; attorneys; CPA's; and members of the public in general, seeking information on a wide range of internal revenue issues.

Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points

The incumbent coordinates the work of others. Although the contacts often require considerable tact and diplomacy, the persons dealt with are usually working toward mutual goals and generally have cooperative attitudes.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The incumbent's work requires some walking, standing, bending, and carrying light items such as books and papers.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The work includes the everyday risks and discomforts typical of offices and meeting rooms.

TOTAL POINTS -- 1820

SECRETARY (STENOGRAPHY), GS-0318-08, BMK# 03*Duties*

This position is located in the office of the Technical Director of a research and development center.

-- The incumbent receives all visitors and telephone calls to the Technical Director. Screens the calls by determining the nature and purpose of the call, and referring calls not requiring the Director's attention to other staff members or handling the matter personally. When calls must be referred to the Director, the incumbent furnishes the Director with information readily obtainable to aid in the discussion.

-- The incumbent maintains the Technical Director's daily calendar, making appointments and arranging conferences and meetings without specific prior approval, based on a knowledge of the Director's schedule. On own initiative, makes arrangements for such meetings by reserving space, setting the specific time, and contacting all personnel expected to attend. If necessary, arranges for transportation and lodging for participants. Incumbent transmits agenda and all necessary background material to participants and advises them of the topics to be discussed.

-- The incumbent controls all correspondence. Receives all incoming unclassified mail for the Technical Director and maintains a daily log of all official mail. Determines whether correspondence should be brought to the attention of the Director, referred to appropriate personnel, or handled personally. Follows up on incoming mail to insure timely and appropriate action. Reviews all outgoing correspondence for neatness, accuracy, adherence to established format, and adherence to the Director's policies. Drafts correspondence, such as routine official correspondence, social and personal acknowledgments, congratulatory letters, acceptance letters, and routine office reports.

-- The incumbent takes and transcribes highly technical material, frequently classified material. Incumbent is responsible for spelling, punctuation, grammar, and format of the completed work. Records and transcribes the minutes of the Technical Director and the staff; prepares the minutes for distribution, singling out the action items and follows up as required.

-- The incumbent gathers material for use in reports, presentations, and speeches of the Technical Director. This includes maintaining a file of visual aids for use in presentations and making all arrangements for the presentations.

-- When the Director is to host large conferences, the incumbent arranges a secure meeting place on station; writes letters to the group concerning such matters as security requirements; and arranges hotel accommodations, transportation to and from the center, social

arrangements, and secretarial assistance while the guests are on station. The incumbent takes dictation by phone concerning conference matters and follows up on needed action.

Factor 1. Knowledge Required -- Level 1-5 -- 750 points

Knowledge Type III

-- Knowledge of the duties, priorities, commitments, policies, and goals of the Director and the staff to perform non-routine assignments such as independently noting and following up on commitments made at meetings and conferences by staff members.

-- Knowledge of the substantive programs of the Research and Development Center as they relate to the applicable administrative and clerical functions.

-- Skill in taking and transcribing dictation. A qualified stenographer is required.

-- Skill in operating a typewriter.

-- Knowledge of grammar, spelling, punctuation, and required formats.

Situation C

The Technical Director supervises approximately 1,800 employees in eight major subordinate organizations, each of which is divided into several echelons. The Center has many complex programs which are, in turn, heavily interrelated with other large research and development efforts in the Department. The Technical Director and the major subordinate organizations each have staff specialists providing administrative support. The programs of the Center require extensive administrative control within the Center and extensive dealings and coordination with other research and development activities outside the Center. The Technical Director is a member of several committees of great importance to the Department, and the membership of the committees consists of the top echelon of R & D organizations within the Department. The Director is a leading authority in his own field and is a member of many professional societies, holding office in several.

Factor 2. Supervisory Controls -- Level 2-4 -- 450 points

The supervisor sets overall objectives of the work. The secretary and supervisor, in consultation, develop the deadlines and work to be done.

The incumbent handles a wide variety of situations and conflicts independently, using initiative to determine approach to be taken or methods to be used. The running of the office is left substantially to the incumbent.

The supervisor reviews the work for overall effectiveness.

Factor 3. Guidelines -- Level 3-3 -- 275 points

Guidelines are available for the more routine aspects of the work, and the Technical Director provides for some assignments, but much of the time the incumbent must simply rely on personal judgment to carry out the work in the most effective manner.

Factor 4. Complexity -- Level 4-3 -- 150 points

The work includes various duties involving different and unrelated processes and methods. The incumbent is responsible for ensuring that the procedures and administrative controls of the Technical Director's office work smoothly and that administrative details are not overlooked.

Decisions regarding what needs to be done and how the work should be done are based on secretary's knowledge of the goals, policies, priorities, and commitments of the staff and involve analysis of the subject, phase, or issues involved in individual assignments.

Factor 5. Scope and Effect -- Level 5-2 -- 75 points

The incumbent ensures that the clerical and administrative portions of the Technical Director's work are accomplished effectively, allowing the Technical Director to concentrate on professional and managerial duties. The effectiveness of subordinate organizations is affected by the degree to which the Technical Director's office runs smoothly.

Factor 6. Personal Contacts -- Level 6-3 -- 60 points

Contacts are with leading scientists from universities and industry, and with high ranking officials at the Center and in other research and development organizations throughout the Department concerning various projects and issues with which the Center is involved.

Factor 7. Purpose of Contacts -- Level 7-2 -- 50 points

The purpose of the work is to plan and coordinate the work of the office, including all the clerical and administrative details incidental to that work such as arranging conferences.

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The work requires some walking and carrying light items such as paper, files, and books. No special physical qualifications are required to perform the work.

Factor 9. Working Conditions -- Level 9-1 -- 5 points

The work is performed in an office setting.

TOTAL POINTS -- 1820

SECRETARY (STENOGRAPHY), GS-0318-09, BMK# 01*Duties*

The incumbent assists the Director of a hospital which includes two divisions with a total of over 1,000 beds and is affiliated with two schools of medicine.

-- The incumbent acts as office manager for the Director's office and ensures that the practices and procedures used by secretaries in subordinate offices are consistent with those of the Director's office. On own initiative, recommends changes in administrative policies. Devises and installs office procedures and practices to be used by secretaries in subordinate offices. Prepares agenda for and conducts periodic secretarial training sessions for all secretaries to department heads. The agenda include training in all phases of secretarial work such as correspondence, telephone procedures, publications, directives, reports, and public relations responsibilities.

-- The incumbent responds to inquiries and administrative problems brought to the Director by members of the staff and officials of the agency's central office, State and local governments, other hospitals and organizations, other Federal agencies, and congressional staff. Notifies the appropriate staff officials of the need for information or recommendations, and either prepares the response or follows up to ensure a timely response by others.

-- The incumbent exercises exclusive control over the Director's appointments, with complete authority for commitments of time. Screens all calls and visitors, answering most questions and completing most business involving established policy or routine matters without referring people to the Director.

-- The incumbent receives all correspondence for the Director; replies to mail not requiring the Director's attention; routes matters requiring action by hospital department heads; and follows up to ensure that actions are completed. Screens all correspondence prepared for the Director's signature for clarity, completeness of reply, and grammatical and procedural correctness. Returns inadequate submissions for retyping or recomposition. Signs correspondence and certain procedural authorizations in the name of the Director when previous instructions have covered the matter. Screens all publications, directives, and periodicals, and brings those of significance to the Director's attention. In the absence of the Director, maintains a file of correspondence and events of which the Director should know,

and, upon the Director's return, brings such matters to the Director's attention. As Classified Information Officer for the hospital, is responsible for the receipt, control, logging, safekeeping, and necessary action on all classified material received in the hospital.

-- Arranges conferences for the Director, and, at the request of central office officials, for meetings to be held locally. This includes preparing an agenda, notifying participants, and arranging luncheons and similar matters. Develops background information and composes drafts of introduction and talks to be presented at various meetings by the Director. Attends and records the minutes of meetings which are later summarized and distributed. Checks to ensure that commitments made at the meetings are met and keeps the Director informed.

-- Oversees the work of one clerk-stenographer. Takes and transcribes dictation from the Director.

Factor 1. Knowledge Required -- Level 1-6 -- 950 points

Knowledge Type IV

-- A basic foundation of administrative concepts and practices sufficient to enable the incumbent to recommend changes in administrative policies, devise and install procedures and office practices affecting subordinate organizations, and foresee administrative problems and requirements.

-- Knowledge of the Director's views sufficient to enable the incumbent to perform duties such as developing material for the Director's use in public speaking engagements.

-- Knowledge of the substantive programs of the hospital as they relate to the hospital's clerical and administrative functions.

-- Skill in advising and instructing secretaries in subordinate organizations concerning such matters as directives, reports, correspondence, and telephone procedures.

-- Skill in taking and transcribing dictation. A qualified stenographer is required.

-- Skill in operating a typewriter.

-- Knowledge of grammar, spelling, punctuation, and required formats.

Work Situation C

The hospital is divided into two large divisions, each of which is further subdivided into several echelons. There is a complex system of internal procedures and many extensive reporting

Factor 8. Physical Demands -- Level 8-1 -- 5 points

The work is sedentary. It occasionally requires carrying light objects such as files, books, and papers. No special physical qualifications are required.

Factor 9. Work Environment -- Level 9-1 -- 5 points

The work is performed in an office setting.

TOTAL POINTS -- 2020

EXPLANATORY MEMORANDUM

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1. This memorandum provides interpretative guidance concerning the determination of Work Situation in Factor 1, Knowledge Required by the Position, as well as other more general guidance on the classification of secretarial positions. This material is to be used in conjunction with and not as a substitute for the criteria in the standard itself.
2. Factor 1 requires that two elements be considered in determining the overall level to be assigned for the factor. One of these elements, Work Situation, reflects the complexity of the organization served by the secretary. This, in combination with Knowledge Type produces the number of points to be credited for Factor 1.
3. *What is an "organization" as referred to in the standard?* The intent of the term "organization" is to define as precisely as possible the boundaries of the secretary's administrative responsibility. The term can, therefore, have different meanings in different contexts. As applied to the evaluation of a secretarial position, an "organization" is a recognized functional entity which supports or carries out a program or mission. This functional entity does not always appear as a "box on a chart." Its sphere of responsibility and mission (i.e., reason for existence), however, must be recognized and defined within the overall agency structure. The term "organization" is not automatically synonymous with such structural entities as agency, region, installation, office, branch, division, etc. Of course, this does not mean that each function or group of functions is inherently an "organization" and, therefore, warrants the establishment of a secretarial position. Judgment must be exercised in assuring that an entity defined as an "organization" meets the intent of the standard.

In conjunction with the determination of Work Situation, the "organization" considered will vary in size, scope of secretarial responsibility, complexity, and program authority or influence. The

important consideration is how all of these factors impact on the secretarial position itself and subsequently on the position's evaluation.

4. *What are typical characteristics of Work Situation A?* WS-A organizations are typically small and of limited complexity. Some organizations which are large enough to be subdivided into a subordinate structure may also be WS-A when the administrative and clerical processes, mission or program complexity, and requirement for external coordination by the secretary are limited. In WS-A organizations there is little need for the secretary to maintain contacts outside of the organization which add complexity to the secretarial position or require substantive coordination. The program or mission of the WS-A organization is relatively "self-contained", i. e., functions with limited and informal direction and coordination, and, therefore, lessens the responsibility the secretary could have.

5. *What about Work Situation B?* The basic characteristic of a WS-B organization is that its structure and/or program or mission allows the secretary to exercise a greater degree of responsibility and judgment, and to provide a greater depth and breadth of administrative support than is typical of WS-A organizations. There is the opportunity for the secretary to establish and maintain frequent and substantive contacts outside of the organization, to coordinate numerous substantive administrative details in support of the organization's program or mission, and to be conversant with not only the internal operation of the organization but also of its relationship and involvement with outside organizations.

The material in the standard relating to WS-B addresses two separate situations or types of organizations. (This fact may have been overlooked by some in applying the standard resulting in too restrictive an assignment of WS-A to some positions.)

The first part of the discussion concerning WS-B in the standard addresses typical WS-B organizations. The second part addresses those organizations described as WS-A which under certain circumstances may be WS-B organizations. It is the application of the second part which appears to have caused the most difficulty. Many small organizations of limited staff are responsible for programs or functions which place upon the secretary far more substantive and complex demands and responsibilities than is typical of WS-A. The secretary's role in these organizations requires establishing and maintaining numerous contacts outside of the organization which may be either internal or external to the agency or area of program responsibility. As is typical in all WS-B organizations, these contacts are for the purpose of coordinating substantive program requirements, administrative details, and staff support responsibilities. In these organizations the administrative and clerical procedures and processes necessary to the functioning of the organization materially add to the complexity of the secretary's position.

Some organizational entities of this type frequently found in an agency's structure which may have the potential for the assignment of WS-B include Congressional liaison offices, public affairs offices, offices of the general counsel, small scientific or research oriented program offices which

have extensive contact with academic institutions, professional societies, or other nongovernment organizations, and organizations at the higher levels within the agency whose scope of responsibility and degree of complexity exceed those described in WS-A. The provision of the above examples does not constitute a determination that all organizations of this type are WS-B. Careful consideration of all factors which influence the secretarial position must be made before assigning the Work Situation.

6. *What are the characteristics typical of Work Situation C organizations?* WS-C organizations are typically major segments or functional entities of a total organization. While size is not necessarily the controlling factor, WS-C organizations are frequently large enough and of sufficient internal complexity to require support from internal administrative functional entities in such areas as personnel management, budget, procurement, management analysis, etc. Within the parameters of appropriate governing rules, regulations, and policies, the decisions made relating to the management of the WS-C organization and its subordinate structure rest with the WS-C organization itself.

The presence of a separate administrative office or function which serves to facilitate the administrative processes of an organization does not automatically justify the determination of a WS-C organization. The ultimate responsibility of the WS-C organization for the total management of the organization's subordinate structure, combined with responsibility for the overall management of the organization's mission or program typically, but not always, requires an augmenting staff of administrative specialists. In some cases, offices specifically responsible for carrying out administrative functions (e.g., personnel offices, fiscal offices, procurement offices, etc.) fall within the line control or authority of the WS-C organization. In other situations, these functions are performed by "servicing" organizations which are sometimes geographically separated from the WS-C organization, and which fall within the line authority of another organizational entity.

In any case, however, it is the degree of managerial autonomy, i.e., the independence and responsibility for decisions which affect the overall management of a program or mission and its support, which is the ultimate consideration. Managerial autonomy, in this context, does not apply to day-to-day decision making. Managerial autonomy contemplates such responsibilities as long range planning, commitment of resources, program evaluation, decisions which impact on relationships with other groups, etc.

7. *How are positions which are assigned secretarial and other work evaluated?* When classifying these positions, work assigned which may be other than secretarial work must be carefully considered. Some positions, often at the higher levels, are also responsible for work which is directly involved in the program of the organization, e.g., policy analysis, substantive development of reports, etc. In these instances, this work must be evaluated in terms of the knowledges, skills, and abilities necessary. Appropriate standards other than the standard for the Secretary Series, GS-0318, are to be used. Care must be taken to avoid classifying a position as a secretary

because it has historically been in the GS-0318 series, because it superficially appears to be a secretarial position, or because it may be referred to as a secretarial position.

8. The interpretive information provided above concerns primarily the determination of Work Situation in the evaluation of a secretarial position. Basic to this determination is an evaluation of all aspects of the secretary's position. An organization, in and of itself, does not determine the level credited for Factor 1 or for any other factor of the standard. The most important consideration is the manner in which the work situation, or organizational environment, impacts upon and influences the complexity and responsibility of the secretarial position.

ENDNOTES

1 - The number of organizational echelons is not necessarily the controlling element in determining that the definition of Work Situation C is met. The presence of conditions such as augmenting staff specialists performing management analysis, administration, personnel management, and similar functions in the organizational structure, or the degree of managerial autonomy, may be more significant as criteria in certain situations.