Office/Clerical Union
Job Qualifications “Grid” and Employee Upgrade Request Form

Employee Name:
Department:
Current title and grade:
Date completed:

For sections I through IV, select the one level that best describes the position and provide examples as indicated. For Section V, select all that apply and provide examples in the boxes as indicated. Detailed examples are essential to accurately assess the grade level of the position. If you have a higher level of skill or ability but the job does not regularly require it, then it will not be considered in the grade level decision.

I. Decision Making

☐ **Basic**: Decisions are based on established processes with few variables under direct oversight from a supervisor or administrator and primarily affect the immediate department. Job tasks are primarily routine. Many of the decisions are repetitive, have a limited impact and are readily correctable.

☐ **Intermediate**: Decisions are based on independent research and past experience and have consequences with departmental, campus and external constituencies. Receives general supervision. Job tasks involve frequent multi-tasking. Many of the decisions are unique, have a significant impact and are not easily undone. Develops new and unique ideas.

☐ **Advanced**: Decisions are self-directed, require initiative and the exercise of independent judgment with little or no supervision, decisions have large consequences with internal and external constituents. Job tasks involve frequent multi-tasking and demanding deadlines. Most of the decisions are unique, have a significant impact, and are very difficult to correct.

**Provide specific examples of Decision Making associated with this position:**
II. Technology and computer software

☐ **Basic**: Creates and manages documents and spreadsheets requiring knowledge of formatting, basic formulas and document proofing. Creates new records in databases, updates existing records.

☐ **Intermediate**: In addition to the above, manages mailing distributions using mail merge, analyzes pivot tables, creates graphs. Uses existing queries and reports for reporting purposes requiring some modification and updating.

☐ **Advanced**: In addition to the above, designs documents for publication. Conducts advanced data analysis and manipulation. Writes database queries and complex reports within databases. Trains others to proficiency in specialized databases or software.

**Provide specific examples of Technology and computer software associated with this position:**
III. WFS and Financial responsibilities

☐ Basic (processing and monitoring): Would not have the department’s budgetary accountability but is responsible for monitoring smart keys and balances. Processes transactions such as WFS “smartdocs”, redistribution forms, P-Card, reimbursements and payroll with some direction. Basic knowledge of WFS, financial concepts, and University financial policy needed.

☐ Intermediate (researching and reconciling): In addition to the above, would generally have the budgetary responsibility for a department. Can research and reconcile issues with little or no direction. Runs and reviews established WFS reports. Can anticipate and correct errors. Accounts may include some external grants. Has the ability to communicate financial policy information to others.

☐ Advanced (complex researching and reconciling): In addition to the above, responsible for compliance and processes of external grants including assistance with development of reporting materials to constituents outside the University. Can research and reconcile the most complex issues with little or no direction. Creates extensive financial reports requiring data manipulation for supervisor or others.

Provide specific examples of WFS use and financial responsibilities associated with this position:
IV. Verbal and Written Communications

☐ Basic: Contacts usually involve routine, non-sensitive issues. Provides basic answers to general inquiries. Creates basic documents and proofreads documents for errors.

☐ Intermediate: Work normally involves frequent contacts with others generally for the purpose of giving or obtaining non-routine information. Requires the ability to answer questions and resolve problems using tact and diplomacy. Writes draft letters, edits written materials and webpage text for department.

☐ Advanced: Communicates answers to complex questions. Most interactions with others require a high degree of sensitivity and may have a significant impact. Writes and produces documents such as brochures, newsletters and web pages.

Provide specific examples of verbal and written communications associated with this position
V. Other advanced responsibilities and requirements

Please select all of the following that apply to this position

☐ Event and program planning and publicity for large or high profile events
☐ Delegates and monitors the work of other Office/Clerical employees in the department.
☐ Regularly plans, coordinates and administers high volume application processes for a department. For instance, may support multiple instructor/faculty searches regularly (2 or more each year) with a large applicant pool (typically 150 candidates or more) and/or multiple departmental tenure and promotion cases. May facilitate large applicant pools for the graduate admissions process (typically 30 candidates or more).
☐ Regular oversight of a large number of students (typically 10 or more) doing non-clerical work
☐ Specialized professional training, certification and/or education required to perform the job
☐ Maintains a high level of direct support for a large number of faculty or administrators (typically 20 or more). Must be the only office/clerical employee providing any support in the department.

Provide specific examples of the responsibilities or requirements indicated above that are associated with this position


Send completed copy to Human Resources

(see Article V, Section 9 of the Agreement for additional information)
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