

PART I

DEPARTMENT OF EDUCATION
STATE OF HAWAII

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Class Specification for the Class:

PERSONNEL CLERK AND TECHNICIAN SERIES

This series includes all classes of positions which perform and/or supervise personnel clerical and or technical support work in one or more areas of personnel management services which includes position classification, pay administration, recruitment, examination, employee development, employee management relations, labor relations and personnel administration. The performance of personnel clerical and technical work primarily requires a practical knowledge of personnel functions and services, knowledge of personnel regulations, rules, procedures and program requirements, and the ability to apply standard methods and procedures to accomplish the work process.

Positions in this series are found in the central personnel agency, Department of Human Resources and Development (DHRD), and in the administrative and personnel offices of line departments. They provide support to professional personnel management positions, departmental personnel officers or to administrative officers who oversee personnel programs.

Lower-level personnel clerks are primarily assigned to clerical support work which is performed according to established methods and routines from which there is little room for deviation. Examples of such work include sequencing forms, briefly explaining personnel job application forms and how to complete them, checking forms for signatures and completion, and date stamping, logging and entering applicant data onto forms or in the computer.

Higher-level clerical positions are progressively more involved with personnel support work which requires substantial knowledge of organizations and substantial knowledge and application of personnel rules, regulations, procedures and program requirements in selecting the most appropriate action from among several possible alternatives. Alternatives exist because the work may not be completely standardized and may require deviation from established procedures in new or changing situations. Higher-level positions, therefore, use more judgment in selecting the best courses of action.

Personnel technicians are the highest levels in this series and generally function as para-professionals. Para-professional work is defined as work in which positions perform some of the duties of a professional in a supportive role, but which usually requires less formal training and/or experience than that normally required for

professionals. Positions do not require the scope and depth of knowledge required of professional personnel management positions.

Personnel technicians may perform the same work as those performed by lower-level personnel management specialists. However, for the personnel technician, the work is generally performed as a continuing, permanent level of assignment, based on long experience and familiarity with precedent cases and ongoing personnel processes.

The trainee personnel management specialist's assignments, on the other hand, are specifically designed to develop judgmental and analytical skills in applying principles and practices of professional personnel management work. Such work represents a temporary stage of development, as the trainee personnel management specialist is expected to progress to work of broader scope and complexity encompassing a thorough knowledge of personnel administration theories, concepts, principles and practices.

The distinction between a personnel technician and a personnel management specialist depends heavily upon the nature and purpose of the assignment and requires a knowledge on the part of the classifier of: (1) management needs and intent; (2) program; (3) depth and scope of assignments; and (4) qualifications required. This is particularly true in considering a personnel management specialist trainee as compared to a top level personnel technician. In such an instance, the background which the individual brings to the assignment and the purpose of the assignment must both be taken into consideration.

Personnel management work is divided into eight areas: position classification, pay administration, recruitment, examination, employee development, employee management relations, labor relations and personnel administration services. Personnel clerks and technicians may provide support to professional positions in any of these areas; whenever possible, examples of personnel clerk/technician work will be given to parallel those work areas. Some positions, especially those in smaller offices, provide personnel support work in a variety of areas rather than a single one. However, in all cases, positions shall be evaluated on the basis of the factors described below.

The levels in this series are distinguished by differences in 1) the nature and variety of work, 2) the nature of available guidelines and the judgment required in applying them, 3) the nature of supervision received, 4) the complexity of work performed, 5) the nature and purpose of personal contacts required, 6) supervisory and/or administrative responsibilities, and 7) the knowledge and abilities required.

The absence of a description of a particular work assignment or specialty in the class specifications does not preclude allocation of such positions to that class provided

that the overall scope of the assignments, the level of responsibility, and knowledge and abilities required are comparable to those described.

PERSONNEL CLERK II

8A.515

Duties Summary:

Performs procedural personnel clerical support work which requires the application of a limited variety of procedures and specific guidelines, and where the established order of their accomplishment is clear and does not change except upon direct instructions, as a primary work assignment; and performs other related duties as assigned.

Distinguishing Characteristics:

This class represents the entry level into the series. Assignments are designed to provide training in and experience with the routines and operations of personnel organizations and some acquaintance with the various personnel functions of the organization to which positions are assigned. The work is routinely subject to general administrative and technical review which generally includes at least a daily spot check of completed work for adherence to required forms and procedures. Explicit guidelines are available, such as departmental manuals or other written instructions, or the work is of such a simple nature that oral instructions can be readily given. An incumbent at this level acquires knowledge of terminology related to the assigned work, location of resource materials, the flow of paper through the organization, etc.

For some positions, there may be limited personal contacts with the general public or persons within the organization. In such situations, the incumbents provide readily available and uncomplicated information.

Work is performed under close supervision of a higher-level clerical, technical or professional personnel position, and in accordance with established, detailed guidelines. Assistance is available on matters not covered by guidelines.

Examples of Duties:

Transfers information from source documents to logs or computer files; refers questionable forms/information to supervisor or other higher-level position; checks for the presence of necessary forms and documents; checks forms received for proper sequencing, completion of necessary items and signatures; forwards in accordance with established procedures; collates and distributes forms; date stamps, logs and routes forms; informs callers of test dates of exams; contacts appropriate sources to secure

missing data or documents; and becomes familiar with forms, procedures, policies, reference manuals of the work unit.

In addition, higher-level work may be assigned to experienced workers. This may include checking assigned items of information for conformity to applicable laws, regulations, procedures, etc. (e.g. determining that those who have signed the authorized action do in fact have this authority). Such work is closely reviewed by the supervisor or higher-grade clerk.

Knowledge and Abilities Required:

Knowledge of: Arithmetic (addition, subtraction, multiplication and division), filing and other general office work; standard English language communication skills in order to speak, read and write effectively.

Ability to: Read and understand detailed but uninvolved procedural guidelines, informational materials, etc.; learn and carry out procedures in personnel clerical work systems in accordance with established guidelines and procedures; convey routine information orally and in writing; operate common office appliances; learn to operate other equipment such as audio-visual equipment; work tactfully and politely with others. Some positions may be required to type.

PERSONNEL CLERK III

8A.517

Duties Summary:

Performs detailed routines of limited complexity pertinent to processing of personnel actions which are typically: (a) assigned on a continuing basis and (b) are covered by well-established guidelines, procedures and/or instructions which provide a fairly specific basis for taking action; and performs other related duties as assigned.

Distinguishing Characteristics:

Work assignments at this level require an understanding of the basic purposes of the personnel organization and a working knowledge of the practices and procedures relating to assigned functions.

Some personnel clerks at this level have personal contact with other employees of the organization and the general public, but such contacts are primarily concerned with giving or receiving information which is generally clear cut and recurrent. In contrast to the II level, the Personnel Clerk III usually gives some explanation of the governing

clerical procedures or answers a variety of routine questions. More difficult questions or problems are referred to the supervisor or higher-level personnel. At this level, there are opportunities for exercising judgment in making decisions based on clear guidelines. A Personnel Clerk III receives standing instructions on the sequencing and planning of work for repetitive assignments, and instructions for unusual or new assignments are given on a task basis. Routine work is spot checked. New, unusual or more difficult assignments are reviewed closely by the supervisor or higher-level staff member. More complex work may be assigned for training purposes and is performed under close supervision.

Examples of Duties:

Position Classification: Reviews position action requests to ensure submittal of all forms, consistency of information (e.g. proper codes for the classes cited), and signatures. Ensures position descriptions have been written according to suggested format and include required information such as location of position, etc., and that major tasks total 100%.

Personnel Administration Services: Completes processing of Forms 5, 5A, 5B and other related documents in accordance with instructions provided by the supervisor or as explained in manuals. This includes checking for completeness and consistency of information with supporting documents and established personnel and departmental procedures and practices. The work is generally limited to the simpler actions.

Recruitment/Examination: Assembles and distributes exam announcements; provides routine information to the public on application and examination procedures, minimum qualifications for positions as noted in vacancy announcements, pay and employee benefits information. Receives application forms, ensures appropriate items have been completed by applicants; informs applicants of any missing documents such as transcripts and verification of licenses. May accept or reject applications based on clear cut requirements such as lack of proof of citizenship or visa. Posts applicant data onto cards or inputs into computer data banks; sends form letters to applicants to inform them of selection/non-selection; and checks applicant data cards and pulls those which have expired (e.g. multiple job refusals, placement elsewhere).

Employee Development: Receives and logs requests for training, segregates by topic, expiration date, etc. Briefly explains training topics to callers or refers to supervisor for more detailed explanation. Brings late requests to supervisor's attention. Checks records, calls employees as directed to ensure pertinency of training request to job, and notifies employees of acceptance/rejection of training requests.

Employee Management Relations: Provides routine information on a variety of employee benefits programs such as Health Fund, Retirement, Tax Sheltered Annuities and Deferred Compensation. Distributes written materials and refers people to persons/offices where additional information may be received; reviews forms for completeness and consistency, contacts employee if information is missing, e.g. child listed but no birthdate on health forms; forwards forms to proper agencies; may assist in maintaining distribution lists for materials to be mailed to departments; ensures that materials are sent out and received in accordance with established time frames; may serve as liaison between employees, central departmental personnel office and employee benefit agency.

Knowledge and Abilities Required:

In addition to the knowledge and abilities required at the next lower level:

Knowledge of: Function of the organizational unit in which employed and its role within the personnel office and department; specific portions of State and departmental policies and procedures and forms pertinent to the work performed; and workflow procedures.

Ability to: Obtain information in accordance with established procedures; prepare simple narrative and numerical reports; and maintain records.

PERSONNEL CLERK IV

8A.519

Duties Summary:

Performs substantive personnel clerical work which requires an examination of the contents of documents and the exercise of judgment to determine the proper course of action and performs other related duties as assigned.

Distinguishing Characteristics:

Positions in this class perform substantive, personnel clerical work which involves examining contents of documents supporting proposed personnel transactions to ensure that: (1) data are consistent both internally and with file information; (2) proper regulations have been cited as authority for the action; and (3) proposed action is appropriate for the intended purpose and conforms to applicable policies, laws, rules and regulations. Judgment is required to determine proper actions to follow and cite from among possible alternatives, but actions are generally those for which case precedents, manuals and other guidelines which provide fairly specific bases for taking actions exist.

Work assignments at this level require knowledge of organizations, pertinent federal/State/departmental policies and procedures, bargaining unit (BU) contracts, memorandum of agreements, etc., relating to assigned functions.

Positions at this level have frequent contacts with employees of the organization, the general public, and personnel employees in other organizations. They are responsible for establishing and maintaining effective personal contacts and are viewed as reliable sources of information. In addition, skill is required in many of the frequent person-to-person contacts which are made for the purpose of securing cooperation, making substantive corrections to improperly completed documents, and explaining regulatory requirements to others.

Routine work is performed independently and may be spot checked for compliance with established laws, policies, rules, regulations, contract agreements and precedent cases. Closer supervision is given on novel or complicated problems. Some positions in this class may be assigned to provide supervision or guidance to lower-level personnel or general clerical positions.

Examples of Duties:

Position Classification: Performs assigned delegated selective certification actions by reviewing selective certification requests and position descriptions, assuring that selective certification is warranted based on duties described in the position description, and making recommendations for approval/need for further information/disapproval. Under close supervision, may review requests for selected, routine, classification actions including reviewing organization charts, similar/identical positions descriptions and class specifications. Makes recommendation to supervisor or other professional for position action.

Personnel Administration Services: Independently completes processing of Forms 5, 5A, 5B and related documents for the less complex actions such as new hires and simple terminations and reallocations. Ensures that all supporting documents have been submitted and properly completed, explains certain regulatory requirements and justifies actions by citing proper authority. Under close supervision may also regularly process more complex actions.

Recruitment/Examination: Screens applications by checking for specified degrees, coursework and occupational licenses; confirms accreditation of schools; determines whether education (coursework, specified degrees) cited meets requirements as defined by class specifications; and calls or drafts letters to schools, applicants or other agencies to clarify and verify information.

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Labor Relations: Screens grievance forms for completeness, conformance to filing requirements; contacts appropriate persons to explain why more information/corrected information is required, explain grievance procedures and standards; accepts/rejects forms in accordance with established guidelines. Researches files for similar cases, federal/State/departmental guidelines, precedent cases and other materials; pulls materials for review by professional staff; and maintains caseload statistics and files.

Knowledge and Abilities Required:

In addition to the knowledge and abilities required at the next lower level:

Knowledge of: Functions and roles of related organizations within and outside the department; pertinent authoritative source documents used such as federal laws, State civil service regulations, BU contracts, precedent cases, department policies, procedures and guides, etc.

Ability to: Understand and apply pertinent regulations, policies, contract agreements, procedures, etc., and exercise initiative and judgment in selecting the most appropriate guide, precedent case, etc.; deal tactfully and effectively with others; and prepare correspondence and reports. For some positions, ability to train, supervise and evaluate the work of others.

PERSONNEL CLERK V

8A.521

Duties Summary:

Independently performs substantive personnel clerical work that includes a significant proportion of those of a novel and/or unusually complicated nature which presents many possible alternative courses of action and requires use of considerable judgment; and/or performs limited technical assistance work; and performs other related duties as assigned.

Distinguishing Characteristics:

Personnel clerks at this level independently perform highly complex, substantive personnel clerical work including a significant proportion of those of a novel and/or unusually complicated nature; and/or limited technical assistance work under closer supervision in one or a variety of personnel specialty areas. Positions may also provide guidance or supervision to lower-level general clerical or personnel clerical positions, with

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responsibility for training, developing and improving work procedures and materials, and scheduling and monitoring work assignments.

For positions which perform substantive personnel clerical work which include a significant proportion of those of a novel and/or unusually complicated nature, a thorough and comprehensive knowledge of pertinent federal/State/departmental regulations and policies, BU contracts, memorandums of agreement, etc., is required. Documents may at times conflict with each other or proposed actions may deviate from established procedures in new or changing situations or conditions. Positions are expected to exercise considerable initiative and judgment to research and refer to a variety of standard references, guides and precedents, and to seek consultations as necessary to clarify information and make decisions within established parameters. Substantive personnel clerical work is performed independently and may be spot checked, but essentially represents the final technical review.

Positions which perform limited technical assistance work must be familiar with those documents and materials pertinent to their work, e.g. a position in classification must be familiar with assigned class specifications, organizational charts, selective certification guidelines. Such work is generally performed under closer supervision and guidance.

Personnel clerks at this level have significant person-to-person contact with employees, managers and other agencies as they provide expert information and exercise their own initiative and judgment to seek clarifications on regulations and procedures.

Examples of Duties:

Position Classification: Reviews requests for classification actions which are limited in complexity (e.g. similar and/or identical positions); reviews organization charts, similar/identical position descriptions and class specifications. Makes recommendation to supervisor or other professional for position action.

Personnel Administration Services: Independently completes and serves as final authority for processing the full range of Forms 5, 5A, and/or 5B and related documents. A significant proportion of work involves novel or unusually complicated actions such as computing retroactive reallocations, reinstatements from suspensions, determining promotion/transfer status from cross over BU actions, computing projected pay costs as a result of repriced classes. Researches, attempts to resolve and brings any conflicts in interpretation/implementation of authorizing documents to the attention of the supervisor or central agency personnel.

Recruitment/Examination: Screens applications for selected classes by comparing applicant's experience and education with class specifications and other standards; establishes lists of eligibles for designated classes by taking into account a variety of qualifying factors for each position vacancy; and monitors selections made by line agencies to ensure timeliness and conformance to established rules.

Employee Management Relations: Resolves complex health fund problems (e.g. retroactive medical coverage because of job loss and refusal of ex-spouse to testify to termination of medical coverage) by reviewing policies, verifying information from enrollees and other persons, and making recommendations to Health Fund to accept non-conforming enrollments.

Knowledge and Abilities Required:

In addition to the knowledge and abilities required at the next lower level:

Knowledge of: Thorough and comprehensive knowledge of pertinent federal/State/departmental policies, procedures, regulations, BU contracts, etc.

Ability to: Research pertinent rules, regulations, policies, BU contracts, precedent cases, etc., and to exercise judgment in selecting the most appropriate guidelines as the basis for action from among the various established and precedent materials available; explain regulatory and policy requirements and the effects of such requirements; for some positions, the ability to train, supervise and evaluate the work of others.

PERSONNEL TECHNICIAN VI

8A.523

Duties Summary:

Supervises and participates in the performance of substantive personnel clerical work that includes a significant proportion of those of a novel and/or unusually complicated nature and/or limited technical assistance work and/or independently performs the full range of technical personnel work; and perform other related duties as assigned.

Distinguishing Characteristics:

Positions at this level are of two types:

Type I positions supervise and participate in the performance of substantive personnel clerical work that includes a significant proportion of those of a novel and/or unusually complicated nature and/or limited technical assistance work. A position of this type assigns, reviews and evaluates the work of subordinates; prepares procedures and guidelines based on established policies and practices; advises subordinates on difficult and problem areas; personally handles the most complex assignments; monitors workload; and recommends changes in procedures.

Type II positions perform technical work which includes the same work items as those typically performed by lower-level professional personnel specialists, but limited in complexity by factors such as stable organizations; stable and clearly delineated situation, positions, classes, etc.; situations, positions, etc., with similar characteristics; and clear standards and guidelines; etc. Technical work is expected to be performed independently with infrequent need to seek supervisory assistance during the course of the work.

Both types of positions are regarded as expert sources of information on regulatory and procedural requirements and are regarded as authoritative sources of information in the assigned area of work. The processing of substantive personnel clerical work is generally accepted as final without further formal review other than a cursory review made by the supervisor or on a post-audit basis at a higher-echelon office.

Positions in this class utilize their knowledge of organizations, rules, regulations, past practices and evolving trends to provide substantive advisory services to agencies, managers and individuals.

Personal contacts with members of the public and individuals outside the unit are frequent. These contacts may be for the purpose of obtaining information upon which a decision can be made (e.g. information relating to the suitability, eligibility, relative degree of qualification of an applicant for an occupation or for placement into a specific job). Explanation of regulatory and procedural requirements may also be made.

Examples of Duties:

Position Classification: Gathers and reviews data and information and recommends a classification for several types of occupations in situations where (1) the organizational environment is stable; (2) positions themselves tend to be stable and their characteristics are readily discernible; (3) a number of the positions have essentially the same characteristics; and (4) where applicable standards or guidelines are clearly defined and require relatively few judgmental decisions. Such work would include explaining to both employees and their supervisors the basis for making a classification recommendation. However, the final decision as to the allocation of level to the position

is made by a position classification specialist. Explains action taken as necessary to employee and supervisor.

Personnel Administration Services: (1) Serves as a working supervisor in a departmental personnel office, responsible for supervising and participating in the processing of Forms 5, 5A, and/or 5B and related documents for all types of actions for the department. (2) In the central personnel agency, serves as liaisons to line department's staff to introduce and provide training in new regulations and procedures, ensure consistent application of regulations, clarify ambiguous Form 5 implementation requirements and conduct random pre- and post-audits of Form 5s to spot check proper implementation of procedures and regulations.

Recruitment/Examination: Screens applications for assigned classes to determine whether education and work experience meet minimum qualifications for class of work being sought; accepts/rejects applications; writes letters/reports to explain/justify rejections; advises line departments/program staff on available methods of filling positions; recommends most suitable method based on time factors, availability of lists, past history, etc. Recommends the use of incentives such as hiring above the minimum, shortage differentials and the use of lower-level classes to fill vacancies.

Knowledge and Abilities Required:

In addition to the knowledge and abilities required at the next lower level:

Knowledge of: Thorough and comprehensive knowledge of supplementary manuals and instructions, policy statements and precedent cases. For technician positions, a good knowledge of the organization served and the needs of the organization.

Ability to: Exercise sound judgment in selecting appropriate guidelines, from among various pertinent published and precedent case materials; deal with a variety of people under different circumstances, including pressure situations where information must be provided rapidly and accurately; provide substantive advisory and consultative services. For some positions, the ability to plan and supervise the work of others.

PERSONNEL TECHNICIAN VII

8A.524

Duties Summary:

A position at this level performs the highest level of non-professional work in personnel, in addition to supervising and participating in the performance of technical

personnel work comparable to the next lower level or serves as immediate and overall supervisor of a group of subordinates performing personnel clerical/technical work comparable to the Personnel Clerk V level; and performs other related duties as assigned.

Distinguishing Characteristics:

Positions at this level are of two types:

Type I positions perform, on a regular and ongoing basis, advisory and consultative services similar to that performed by professional personnel positions, but limited by the complexity of work and scope of assignments. In addition, positions supervise and perform technical work comparable to Personnel Technician VI. Positions at this level function in a highly independent manner.

Type II reflects a full-time supervisor with overall responsibility for supervising a group or groups of subordinate workers performing work comparable to Personnel Clerk V.

A position of this type has considerable responsibility for the quantity and quality of work performed and services provided. The work involves responsibility for planning for the work and services of the unit; developing and implementing operating procedures; and making recommendations to management regarding changes in policies and procedures. There is frequent requirement for intense work activity and the position has significant responsibility for establishing and maintaining effective working relationship with others both within and outside the organization.

Both types of positions receive general supervision from a personnel management specialist or departmental personnel officer.

Examples of Duties:

Type I provides advisory and consultative services similar to that provided by professional personnel positions in one or more areas of personnel management; supervises and participates in performing technical work comparable to the Personnel Technician VI level; assigns, reviews and evaluates the work of subordinates; prepares procedures and guidelines based on established policies and practices; advises subordinates on difficult and problem areas; personally handles the most complex assignments; monitors workload; and recommends changes to policies and established practices.

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Type II develops training manuals and new techniques; periodically conducts training sessions for staff; plans, distributes and monitors work; conducts studies of clerical work flow to increase efficiency and implements changes as needed; establishes qualitative and quantitative standards of performance; meets with other agencies and individuals to seek clarifications and discuss work coordination and problem resolution; prepares various operational reports; provide back-up services in the absence of subordinate staff, during periods of heavy workloads or to test new procedures, forms and training methods.

Knowledge and Abilities Required:

In addition to the knowledge and abilities acquired at the next lower level:

Ability to: Provide comprehensive advisory and consultative services; plan, assign and review the work of others; prepare procedures and guidelines.

Due to the transfer of authority to the Department of Education to administer its own Civil Service System pursuant to Act 51 Session Laws of Hawaii 2004, this is an adoption of the class specifications for the Executive Branch Civil Service classes PERSONNEL CLERKS II, III, IV, & V and PERSONNEL TECHNICIANS VI & VII by the Department of Education Civil Service system.

DATE APPROVED: AUG - 4 2006

EFFECTIVE DATE: JUL - 1 2005


Gerald Okamoto
Assistant Superintendent
Office of Human Resources