



STATE OF MONTANA JOB PROFILE AND EVALUATION

The job profile is a streamlined position description and may serve as the core document for all human resource functions such as recruitment, selection, performance management and career and succession planning. It was developed, initially, for use in classifying positions in Pay Plan 020.

If you are converting a position to Pay Plan 020 and the position has not changed simply cut and paste the information needed from the current position description. The position description contains sections that are no longer used to classify the position, such as: Working Conditions and Physical Demands; Management and Supervision of Others; Supervision Received; Scope and Effect; and Personal Contacts. These may still be important to the position and may be included in **Section IV – Other Important Job Information**.

When working with a new position, classification request or change to a position in Pay Plan 020, complete the information below to provide the required documentation for classification.

SECTION I – Identification

Working Title Administrative Clerk/Mail Clerk	Job Code Number 439612	Job Code Title Mail Clerk
Pay Band 2	Position Number 66015	<input type="checkbox"/> FLSA Exempt <input type="checkbox"/> XFLSA Non-Exempt
Department <i>Secretary of State</i>		Division and Bureau Administrative Rules and Management Services Division
Section and Unit Mail Services Unit		Work Address and Phone 1306 E. 6 th Ave. Helena 406/444-1878
Profile Produced By Jean Branscum		Work Phone 444-5596

Work Unit Mission Statement or Functional Description - This section should include a complete statement of the mission or function as it relates to the work unit.

The Secretary of State is one of six executive-branch officers originally designated by the Montana Constitution of 1889. The Office of the Secretary of State (SOS) is responsible for all business registrations. The SOS reviews, approves, maintains, and distributes records of business and non-profit organizations; and files and maintains records of secured financial transactions under the uniform commercial code. The SOS records notary public registrations and maintains the official records of the executive branch and the acts of the Legislature. The SOS administers the state's record center and provides state-wide records management services. The office serves as the central filing and publication source for the Administrative Rules of Montana and the Montana Administrative Register. The Secretary of State serves as Montana's chief election official and is responsible for the application, operation and interpretation of elections laws except those pertaining to campaign finance. The Secretary of State serves on the Board of Land Commissioners and the Board of Examiners.

The Secretary of State's Office is administered by a chief deputy and is divided into four divisions: Administrative Rules and Management Services, Business Services, Elections and Government Services, and Records and Information Management. The Mail Services Unit is included in the Administrative Rules and Management Services Division. This Division executes the duties of the Secretary of State's Office under the Montana Administrative Procedure Act and provides general administrative and technology support services for the entire agency. Agency-wide services provided include agency information systems support for local area network computer and software systems, budgeting, payroll, accounting, procurement, cashiering, mail processing, and human resources. The Administrative Rules Services provided include technical guidance to state agencies, research, and the filing, indexing, organizing for publication, and distribution of the Administrative Rules adopted by state agencies in the Administrative Rules of Montana and the Montana Administrative Register.

The Mail Services Unit is responsible for the department mail function and related assistance; for serving as the liaison with Central Mail Services; and for defining department mail policies and procedures.

Describe the Job's Overall Purpose:

The primary purposes of this job are to distribute incoming mail and process outgoing mail.

SECTION II - Major Duties or Responsibilities	% of Time
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This section should be a clear concise statement of the position's duties. Well written thorough task duty statements are required here to accurately evaluate the position.

1. What are the major duties or responsibilities assigned to this position? Group duties in order of importance and estimate the percent of time needed to perform each duty. **NOTE:** Because you are identifying **major** duties usually 3-5, the quantity of time probably will not be less than **20%**. If a duty is essential but not performed routinely you should list it. For example, lobbying during the legislative session may not take up a large percent of total work time, but can be an essential duty.

A. Coordinates incoming office mail processing

55%

1. Receives and sorts mail from central mail and other delivery services.
2. Opens mail, stamps date and time received, writes receipts for cash received, routes cash, checks, other documentation and mail to appropriate person.
3. Because of extreme volume of materials, including checks, that are received as part of annual filing processes, individual is responsible for the proper handling and security of mail. There are tight deadlines for processing documents which creates pressure to process mail quickly and accurately.
4. Routes expedited and priority mail to appropriate person/bureau for immediate response.
5. Distributes mail to appropriate individual or work unit ensuring timely delivery, including express shipments, registered mailings, and specialized delivery services for office staff.
6. Processes interoffice and interagency mail. Includes pick-up and appropriate distribution of warrants and paychecks.

B. Coordinates outgoing office mail processing

30%

1. Processes outgoing express mail by delivering to appropriate mailing center and maintains inventory of express mail materials.
2. Processes outgoing certified mail and other mail for the Business Services Division, includes assisting with annual renewal mailings and other bulk mailings.
3. Processes interoffice and interagency outgoing mail, including daily delivery of deposits.

C. Files financial documents.

Assists with the timely and appropriate filing of financial documents

10%

D. Other Duties.

This position performs a variety of other duties as assigned by the supervisor in support of the agency mission and work unit objectives. This includes exchanging information with agency staff and the public; providing training, education, and professional and technical assistance; participating in ongoing training and educational programs; and performing a variety of other duties as directed.

5%

2. Give specific examples of the types of problems solved, decisions made or procedures followed when performing the most frequent duties.

Guidelines are available to assist in the determination of the appropriate person to receive incoming mail. Work units have different needs and requirements that are clearly specified such as the location of the date stamp that must be followed. Incumbent has some control over establishing work priorities. Mail delivery has tight timelines and there may be competing demands on the time of incumbent. Incumbent determines proper formatting for documents using knowledge of word processing programs.

3. What do you consider the most complicated part of the job?

The high volume of mail and the need to process and deliver mail quickly can be stressful. Incumbent interacts with a wide variety of people and maintaining good working relationships are important. Clerical duties require good business English and attention to detail.

4. What guidelines, manuals or written established procedures are available to the incumbent?

Mail handling guidelines are detailed in nature. Office organizational chart and directories are available. Supervisor and other personnel are available to answer questions and provide assistance.

5. Which of the duties and/or specific tasks listed under 1. (above) are considered "essential functions" that must be performed by this position (with or without accommodations)?

The following duties are considered essential functions because they require specialized expertise and skill and are the primary reasons the job exists:

Duty A: Coordinates incoming mail processing

Duty B: Coordinates outgoing mail processing

Duty C: Files financial documents

The following mental and physical demands are associated with these essential functions:

PHYSICAL

- Range of lifting (less than 50 lbs.)
- Carry items (papers, envelopes, mail trays)
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Operating a personal computer
- Communicate in writing, in person, and over the phone

MENTAL

- Deal with the public on a regular basis
- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet inflexible deadlines
- Comparing data
- Compiling information
- Coordinating
- Instructing

6. If this position supervises other positions, complete the following information.

The number of employees supervised is .None

List the complexity level of the subordinates .

Please list the Position Number for those supervised .

Is this position responsible for:

Hiring Firing Performance Management Promotions

Supervision Discipline Pay Level Other:

7. Please attach an Organizational Chart (optional).

SECTION III - Minimum Qualifications - List the minimum requirements for **first day** of work.

Please list the main knowledge and skill areas required for the job:

Required knowledge and skills include: 1) knowledge of office functions and personnel; 2) knowledge of mail handling procedures; 2) ability to operate a variety of office equipment including a envelope opener, date stamper; 3) word processing ability; 4) the ability to operate a state phone and to make proper referrals; 5) knowledge of office workflow.

What behaviors are required to perform the duties? SOS Behavioral Competencies

- **Verbal Communication:** Keeps appropriate individuals informed. Listens to others respectfully, understands or seeks clarification, and responds appropriately demonstrating tact and diplomacy. Expresses thoughts and ideas clearly.
- **Written Communication:** Writes clearly, logically and effectively using proper style, tone, grammar, spelling and punctuation.
- **Flexible at Work:** Responds positively to changes in direction, priorities, responsibilities, personnel or assignments. Works effectively in a variety of situations and with a variety of individuals or groups.
- **Working with Others:** Relates to others in an open and accepting manner; is approachable. Offers and accepts opinions constructively. Adjusts to how individuals and the work unit will react. Treats others with respect. Constructively resolves disagreements. Is open to others' ideas and gives credit and recognition to others.
- **Responsive to Work Needs:** Willing to perform different jobs, cross train, or assist wherever needed. Is aware of co-worker workload and responds accordingly.
- **Takes Action:** Takes effective and appropriate action to perform job duties without being reminded. Willingly accepts more responsibility or more work.
- **Forward Looking:** Suggests improvements and new ideas, technologies, and approaches.

Willingly applies new and evolving ideas, methods, designs and technologies to work.

- **Efficiency and Focus:** Uses time effectively and prioritizes tasks. Is aware of workload and makes appropriate adjustments to meet deadlines and complete tasks. Handles interruptions or distractions and stays on task. Achieves goals.
- **Accuracy:** Ensures accuracy of work and makes corrections in a timely manner. Is conscientious and monitors own quality of work.
- **Attendance:** Arrives on time for work and demonstrates good attendance record.
- **Organizational Awareness:** Understands and follows the rules, policies and laws that govern work. Identifies key decision-makers; understands and respects the balance of authority. Acts in an ethical manner.

Education and experience: Please check the one box that indicates the **minimum** educational requirements for this job, as it relates to a new employee on the **first day** of work (not the educational background of the person now in the position):

- | | |
|--|---|
| <input type="checkbox"/> No education required | <input type="checkbox"/> 2 year job-related college or vocational training |
| <input checked="" type="checkbox"/> High school diploma or equivalent | <input type="checkbox"/> College degree (Bachelor's) |
| <input type="checkbox"/> 1 year job-related college or vocational training | <input type="checkbox"/> Post-graduate degree or equivalent (e.g. Master's, JD) |

There may be a variety of fields of study that are acceptable. A Human Resource Specialist may have a Bachelor's in Human Resources, Business Administration, Public Administration or another related field. Please specify the acceptable fields of study:

Other education, training (software), certification (CPA), or licensing (pilot, psychologist) required (please specify):

Please check the one box that indicates the minimum amount of job-related work experience needed as a new employee on the first day of work (not the experience of the person now in the position):

- | | |
|---|---|
| <input type="checkbox"/> No prior work experience required | <input type="checkbox"/> 3 to 4 years job-related work experience |
| <input checked="" type="checkbox"/> 1 to 2 years of job-related work experience | <input type="checkbox"/> 5 or more years of job-related work experience |

Specific experience (optional):

This agency will accept alternative methods of obtaining necessary qualifications.

For recruiting purposes please list examples of acceptable alternative methods of obtaining those qualifications. **These examples should appear on a vacancy announcement.**

SECTION IV – Other Important Job Information

List any other important information associated with this position, such as working conditions, supervision provided or received, scope and effect and personal contact.

Ability to lift 50 pounds.

SECTION V – Signatures

My signature below (typed or hand written) indicates the statements in Section I to IV are accurate and complete.

Employee:

Signature	Title	Date
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Immediate Supervisor:

Signature	Title	Date
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Administrative Review:

Signature	Title	Date
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JOB EVALUATION FORM

This section is to be completed by a trained classifier in the agency or by State Personnel Division.

Prepared By

Date

Position Status: Reclassified Vacant New Position

Choice of Class Series:

Position Summary:

Benchmark Factoring

Classification Factor Level:

The predominant work of this position consists of:

Factor level Comparison:

Benchmark Comparisons:

Classifier Signature

Title

Date

Upon completion of this section the classifier should make certain that the Job Code Number, Job Code Title and Pay Band on the first page of this document accurately reflect the Choice of Class Series and classification factor level determined above. Attach Organizational Chart, Audit Notes or other pertinent information.

This completed document should now be filed in: I:\Classref\Agencyjp\agency#\filename).
File naming convention is: (position#)jp(date).doc (e.g. 000573jp0100.doc, where date is: month year).