

TS-100 November 1990

**General Schedule
Position Classification Standards**



WCPS-2 August 2002

Office Automation Grade Evaluation Guide



**Workforce Compensation
and Performance Service**



Office Automation Grade Evaluation Guide

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COVERAGE

This guide evaluates the use of office automation technology itself, not the duties and responsibilities of the work that the technology supports. It applies to all positions in the Office Automation Clerical and Assistance Series, GS-0326.

This guide is also to be used in combination with other standards or guides to evaluate positions classified in other series when office automation duties, that include word processing, are assigned to those positions. In addition to word processing, for example, an editorial assistant may use desk-top publishing software to edit documents; a program assistant may use project management software to lay out and track project tasks; a visual information assistant may use a graphics package to produce charts; and a secretary may use all of the above. The grade level for such positions is established by the guide or standard that results in the highest grade level for the duties assigned.

Office automation, as used in this guide, refers to the practical use of electronic systems to provide general clerical office support. Electronic systems used in an office environment are comprised of hardware and software components. When used together, these components are capable of storing, retrieving, manipulating, transferring, computing, and printing information. Hardware components include, but are not limited to, electronic typewriters, word processors, personal computers, work stations (keyboards and visual displays) linked to a computer, and associated equipment such as printers, optical scanners, and modems. Typical types of software used in office automation work include word processing, electronic mail, calendar, project management, database management, desk-top publishing, graphics, and spreadsheet.

SERIES DETERMINATION

This guide is not intended to affect current practice regarding series determination. Positions for which grades are determined through this guide will continue to be classified in the most appropriate series in accordance with OPM policies on classifying mixed series positions, the definitions published in the Handbook of Occupational Groups and Families, and material in published classification standards.

PARENTHETICAL TITLES

The parenthetical title *Office Automation* is added to the title of positions excluded from the Office Automation Clerical and Assistance Series, GS-0326, when such positions require significant knowledge of office automation systems and a fully qualified typist to perform word processing duties. The abbreviation *OA* may be used to prevent titles from becoming unnecessarily cumbersome.

When this parenthetical title is used, the *Typing* designation will not be used. When appropriate, however, other parenthetical titles are combined with the *OA* title, e.g., Secretary (Stenography/OA). Whenever a parenthetical title is used, the position description must reflect the duties that require use of that title.

BACKGROUND INFORMATION

This guide refers to the following terms:

FUNCTION - An action or operation performed electronically by activating a function key or sequence of keys. Examples of functions include copy, delete, move, search, calculate, go to, change font, and print.

SOFTWARE PACKAGE - A program of instructions that interacts with the system's hardware to perform operational or functional tasks. Software packages are comprised of program instructions that are applicable to a specific office requirement such as producing textual documents, developing spreadsheets, establishing databases, or presenting information in graphic form.

SOFTWARE TYPE - Software packages that provide similar capabilities are categorized as a particular type of software, e.g., database management, electronic spreadsheet, or word processing.

This guide also refers to some of the more commonly used types of software described in the sections that follow.

WORD PROCESSING - Word processing software, designed for developing textual documents, permits users to create, format, modify, and print documents electronically. With word processing software, an employee can perform such functions as: add, copy, correct, delete, or move text; automatically print document identification or other notations at the top or bottom of each page; automatically number pages; create form letters and automatically merge these with mailing lists; check documents for spelling errors; designate some characters as boldfaced or underlined or italic; and search for and change specific text within a document.

ELECTRONIC SPREADSHEET - Spreadsheet software, used extensively for accounting and financial purposes, is designed for maintaining, manipulating, and calculating numerical data. A typical electronic spreadsheet consists of a matrix of rows and columns similar to the conventional columnar pad. The user can add, delete, or modify the numerical records maintained in these spreadsheets. Spreadsheet software provides formulas, functions, and commands to manipulate or calculate the data to meet multiple report formats.

DATABASE MANAGEMENT - Database management software provides capability for organized electronic storage of information in general categories or files. It allows the user to rearrange the order and number of items of information in printed form, and to search for and display specific items of information.

DESK-TOP PUBLISHING - Desk-top publishing software is used to lay out text, graphics, and pictures on a page. With desk-top publishing software, the user can perform such tasks as: integrating text and graphics on a page; increasing or decreasing the size of charts, graphs, or pictures and using multiple styles and sizes of type.

The distinction between desk-top publishing software and word processing software is diminishing as the latter software packages take on greater capabilities.

GRAPHICS - Graphics software typically allows the creation of charts and graphs based on data provided through a spreadsheet or by the user directly. Some graphics software allows the user to easily switch from one form of presentation to another for different uses. For example, a given set of budget figures might be represented as a bar chart, stacked bar chart, line chart, or pie chart. Most graphics software also allows the creation or selection and placement of pictures and symbols.

PROJECT MANAGEMENT - Project management software permits the user to identify tasks, task relationships, resources, and time requirements of a project; to manipulate that information for planning purposes; to track work progress against the plans; and to report and display information about the project in varied ways. The software automatically adjusts such information as starting, ending, and milestone dates for the project based on changes in assumptions and estimates introduced by the user.

CALENDAR - Calendar software generally permits the user to schedule events on one or more calendars. Additional functions may include capabilities for such purposes as "to do" lists, short notes and reminders, and recording time spent on various projects.

ELECTRONIC MAIL - Electronic mail (email) permits sending information to users through their computers' communication links. For example, memos can be sent to those on designated distribution lists, and the recipients can acknowledge receipt, print copies, and respond through the electronic mail system.

Most software packages are designed to allow extensive capabilities in only one type of software, although some packages provide integrated capabilities for more than one type of software. For example, software for word processing typically includes extensive word processing capability with limited or no graphics and computing capabilities; software for

electronic spreadsheets typically includes extensive computing and sorting capabilities with limited or no word processing capability. Some types of software represent a greater potential for difficulty than others. For example, software for word processing is typically more complex than software for calendar packages or electronic mail, but less complex than software for spreadsheets or database management.

Current trends in office automation technology indicate that many offices have recently obtained or are in the process of obtaining electronic systems with multiple software capabilities. Also, an increasingly greater variety of functions are being included within software packages. Word processing software packages, for example, include increasingly greater capabilities for graphics, calculations, and sorting of information. At the same time, an increase in user aids such as menus and screen prompts facilitates use of the full range of functions available within software packages. These increases in the types of software available, the functions available within software packages, and various user aids generate new opportunities for automating the administrative work of the office.

NOTES TO USERS

Assessing the Overall Difficulty of the Work

1. The difficulty of any office automation assignment depends heavily on the choices and decisions facing the worker and the degree to which forethought is required in making those choices.

At the lowest levels, office automation responsibilities require few choices and little forethought. Work is routine and straightforward, requiring the execution of simple and/or well defined functions. Typical assignments at the lowest levels include: using word processing software to create and/or edit standard letters, memoranda, and reports; entering data as provided into a database and printing pre-defined database management reports; and/or using standard procedures to send a letter via electronic mail and later to verify its receipt.

At the highest levels, office automation responsibilities involve careful planning and many choices. Work requires an understanding of the different software types and how to use them to improve the efficiency and effectiveness of general office support. At this level, office automation responsibilities may also require integrating different types of software packages.

2. Very specific and extensive guidelines for products may raise rather than lower the difficulty and responsibility of a position. When such guidelines are extensive and frequent reference to them would substantially reduce productivity, they increase the requirements for knowledge and judgment, for example, when the work of a position requires rigid adherence

to dozens of complex formats. When strict format requirements are maintained over a wide range of documents, it is no longer practical for the worker to refer continually to the guidelines. This may increase the requirement for knowledge and the ability to select the right approach.

3. Some office automation software packages show the document on the computer screen in the same form that it will appear when printed out, but some do not. With some packages, the user must enter functional commands that appear on the screen along with the text, but in a form or symbol far different from what will appear in print. With some other packages, the user enters functional commands that do not appear on the screen but that will determine the format and content of the material in printed form.

In either case, this imposes a need to visualize or imagine the end product. This need to visualize affects the work and requirements in several ways. First, because the screen provides no feedback regarding the effects of the various commands, the user must have a more thorough understanding in using them. Second, the user must keep in mind the cumulative effects of various commands, e.g., editing and formatting changes, throughout the preparation of the entire document. Typically, the longer the document, the greater the effect of this complicating feature.

4. In some cases, job requirements are not fully articulated at the outset. They grow as the incumbent makes greater and greater application of the technology available. When this increased application of the technology becomes a requirement and constitutes a significant increase in the duties and responsibilities of the position, it must be considered in evaluating the position. By the same token, when the technology is available, but is given limited use, the grade must reflect that limited use.
5. When knowledge of office automation systems is less than that described in Factor Level 1-2 of this guide, and the work of the position involves typing documents using manual or electric typewriters, the Typing and Stenography Grade Evaluation Guide is the appropriate guide for evaluating the position.

GRADE CONVERSION TABLE

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

Point Range	Grade
255-450	2
455-650	3
655-850	4
855-1100	5
1105-1350	6
1355-1600	7

FACTOR LEVEL RELATIONSHIPS

The following table illustrates how the FES factor levels combine in typical office automation clerical and assistance positions at grades GS-02 through GS-07. The table is provided to aid users in understanding the most common factor relationships at each grade; i.e., the level of knowledge required to perform work of a particular level of complexity. However, other combinations of factors may be appropriate for particular positions.

FACTOR LEVELS	GS-02	GS-03	GS-04	GS-05	GS-06	GS-07
1. Knowledge Required by the Position	1-2	1-2	1-3	1-3	1-4	1-4
2. Supervisory Controls	2-1	2-2	2-2	2-3	2-3	2-3
3. Guidelines	3-1	3-2	3-2	3-2	3-2	3-3
4. Complexity	4-1	4-2	4-2	4-2 or 4-3	4-2 or 4-3	4-3
5. Scope and Effect	5-1	5-1	5-1	5-1	5-2	5-2
6. Personal Contacts	1	1	1 or 2	2	2	2
7. Purpose of Contacts	a	a	a	a	a or b	b
8. Physical Demands	8-1	8-1	8-1	8-1	8-1	8-1
9. Work Environment	9-1	9-1	9-1	9-1	9-1	9-1

FACTOR LEVEL DESCRIPTIONS

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

In evaluating this factor care must be taken to identify the actual demands placed on workers. The presence and availability of hardware and software is not enough to determine the knowledge required of a position. For example, some employees may use only the basic or fundamental portions of a software package, not its more advanced features. What counts is actual use.

Some office automation work is performed in a structured setting. The worker performs specified functions in accordance with step-by-step instructions. Such work may require memorizing a large body of formats, processing instructions, and equipment operations, but requires little or no understanding of the software package(s) or operating system.

Performing similar tasks in a less structured setting requires a more intimate knowledge of the software. This may range from the knowledge that a software package provides more than one way to accomplish a function and thus a recognition of the need to look for the most efficient method, to the knowledge of the software package to develop the processing procedures and specific functional approaches for automated products. Evaluating this factor, therefore, requires looking beyond the tasks performed to what the worker must know to identify those tasks and the specific steps for accomplishing them.

Each software package imposes a requirement for an additional set of procedures, functions and knowledge. It is usually more difficult to learn more than one software package of different types than it is to learn more than one software package of the same type. For example, it is generally easier to learn three different word processing packages than it is to learn one word processing package, one spreadsheet package, and one database management package. The degree to which this is true will depend upon the extent to which the full capabilities of each package are used and the similarity of the various functions available within each package.

Level 1-2 -- 200 Points

Knowledge of office automation software is limited. Typing skill is supplemented by knowledge of a limited range of functions and procedures needed to perform basic office automation duties.

The office automation work performed, e.g., standardized word processing, receipt or transmission of electronic mail, updating an electronic calendar, involves a few related steps covered by specific instructions.

Typically, positions at this level require:

- Skill in operating an electronic typewriter, word processor, microcomputer, or computer terminal, using a standard typewriter style keyboard with additional function keys, to produce work accurately and efficiently. Also, skill in operating related equipment, such as printers and modems, as required.
- Knowledge of processing procedures and function keys required to execute at least several basic office automation functions such as storing and retrieving electronic documents or files, activating a printer, inserting and deleting text, printing standardized paragraphs from a glossary, producing letters and memoranda in much the same way as they would be typed on a standard typewriter, entering data into a predefined spreadsheet or database, retrieving data from specified electronic records, and transmitting and receiving electronic mail.
- Knowledge of grammar, spelling, capitalization, punctuation and terminology commonly used in office settings to prepare material correctly from handwritten drafts or voice recordings; and knowledge of standard processing procedures, formats, and distribution and retention policies for the correspondence or reports produced.

Illustrations:

- Uses word processing software and printing equipment to create; copy; edit, e.g., make insertions or deletions or move material from one place to another; store; retrieve; and print a variety of standardized documents using a glossary of prerecorded formats, form letters, standard paragraphs, and mailing lists.
- Transcribes various correspondence and reports from handwritten drafts or voice recordings into proper format, with responsibility for correct spelling, grammar, capitalization, and punctuation. Includes some documents that require skill in performing a few nonstandard functions such as arranging tabulated data or in performing editing functions to incorporate substantive changes made by originators.

- Transmits, receives, and acknowledges electronic mail and messages. Checks transmittals for proper clearances; prints hard copies of incoming mail or messages or routes to other terminals in the unit as designated; and enters dates, time, and identifying data into an index of electronic files or documents.

Level 1-3 -- 350 Points

Knowledge of office automation software that goes beyond what is required for the limited range of functions typical of Level 1-2. Employees are required to apply knowledge of: varied and advanced functions of one software type; varied functions of more than one software type; or other equivalent knowledge of automated systems.

The employee applies knowledge of software functions to produce a wide range of documents that often require complex formats, such as graphics or tables within text, to edit and reformat electronic drafts, and to update or revise existing databases or spreadsheets.

Positions typically require at least one of the following bodies of knowledge and skill:

- The level of knowledge of software needed to produce a wide range of documents requiring use of advanced software functions to enhance productivity or meet needs of complex formats. Examples of advanced software functions include: automatic generation of indices and tables of contents; importation of graphics or special symbols; creation of glossaries; and precise alignment of multiple columns.
- Knowledge of office automation systems to use several types of software for various office needs. The employee must know the processing procedures and function keys for performing a substantial range of functions within each software type.
- Knowledge of specialized terminology to transcribe scientific or engineering reports, laboratory analyses, legal proceedings, or similar material from voice tapes or handwritten draft.

Specialized terminology includes a wide variety of scientific, technical, new, or otherwise specialized terms (such as those used in technical reference material, those used in research reports in specialized fields, or new words developed in connection with new or emerging fields). The employee must apply an extensive knowledge of specialized vocabulary to recognize the terms. Technical dictionaries, texts, unpublished research or developmental materials, or other similar sources are typically referenced to insure the accuracy of the terms involved.

Illustrations:

- Edits and reformats electronic drafts of lengthy reports prepared by staff members who are not trained in word processing. Applies a good understanding of the software to identify and correct extraneous, erroneous, or missing functions as symbolized or illustrated by codes that can be revealed on the screen. Uses other advanced functions to generate tables of contents and lists of exhibits and to perform extensive editing functions resulting from substantial revisions of drafts.
- Uses word processing software to produce a variety of documents. For example, uses database or spreadsheet software to enter, revise, sort or calculate, and retrieve data for standard reports; and uses graphics software to provide graphic symbols, charts, and graphs for viewgraphs. Transmits and receives documents and messages electronically using personal computers or workstations that are networked or linked to other computers or workstations through a central processing unit.
- Processes a variety of laboratory analyses. Must remember the spacing requirements for entering information in numerous reporting formats. Also applies knowledge of special medical, chemical, and forensic terminology and knowledge of what data are reported in certain categories to prepare material in final form from handwritten drafts.
- Prepares verbatim transcripts from voice tapes of interviews, wired contacts and interrogations. The work requires specialized knowledge of slang, foreign terms, street language, or other unusual terminology to convey, as fully and accurately as possible, precisely what was said.

Level 1-4 -- 550 Points

Knowledge of the capabilities, operating characteristics, and advanced functions of a variety of types of office automation software, e.g., database, spreadsheet, and word processing; and knowledge of the similarities, differences, and integration of the different software types.

This level of knowledge is applied to select the most appropriate software type for a specific office need, to integrate different software types into a single document, e.g., to retrieve data, convert it into graphic form, and incorporate it into the text of a report; to devise new methods of automated office support, such as a spreadsheet to keep track of office operating expenses or time and leave records; to resolve problems with current automated office support methods; or to complete other nonstandard assignments using varied office automation technologies.

Illustrations:

- Develops methods for automating administrative reports, considering the interrelationship of reports and multiple uses of the data, e.g., portions of the data used for monthly reports on funds and obligations, training, travel, and staffing can be used for quarterly planning and budget reports. Applies knowledge of the functional capabilities of different software types to select the best software type for each report, e.g., a database versus a spreadsheet. Applies knowledge of how the system works to determine the data categories to be established, to identify the sorting and calculating functions to be performed, and to set up the detailed functional procedures needed to enter and to retrieve the data in the form needed for each report.
- Uses desk-top publishing software to prepare varied news releases, brochures, reports, and publications highlighting the activities of the office. Applies knowledge of the types of information maintained and the procedures for accessing databases throughout the office to locate and import information to be included in publications. Applies knowledge of desk-top publishing capabilities to enhance the presentation of the data, e.g., electronically changing tables to graphs, superimposing one graph over another, adding boxed explanatory text to graphics, highlighting significant material with shadowing, importing graphics into narrative text, varying style and pitch of type within the text, and adjusting size and shape of pages to fit the publication involved.

FACTOR 2, SUPERVISORY CONTROLS

Level 2-1 -- 25 Points

Assignment instructions clearly indicate what is required. The work is performed in accordance with detailed procedural instructions on matters such as: hardware/software selection; use of established databases and spreadsheets; and format, spacing, and arrangement of information.

The employee works as instructed and seeks advice on all matters not specifically covered, clearly defined, or easily located in the instructions or guidelines.

Work is reviewed in draft and/or final form by one or more persons for accuracy, completeness, and conformance to instructions. Final work is checked for proper clearances, number and distribution of copies, signatures, etc.

Level 2-2 -- 125 Points

The supervisor provides general instructions for standard, preestablished, or continuing office automation tasks, e.g., priorities, deadlines, or quantity. When the work is unusual or difficult, more specific instructions are provided regarding desired format, electronic storage requirements, maintenance requirements, hardware/software selection, etc.

The employee works independently in carrying out familiar assignments in accordance with previous instructions, standard procedures for creating documents or entering or retrieving data, and established use of software packages. The employee seeks further guidance when new or unusual assignments call for deviations from established procedures or otherwise require special instructions.

Completed work is usually checked for compliance with office procedures or instructions, technical accuracy, and appearance. When the work is unusual, it is also checked for adherence to special instructions provided.

Level 2-3 -- 275 Points

Assignments are given with information on general administrative changes, deadlines, and priorities. For work that has not previously been automated, the supervisor defines overall objectives.

The employee works independently to plan and carry out steps for completing assignments in accordance with established office instructions and practices for office automation. When current practices or deviations in an assignment cause problems, the incumbent uses own initiative to resolve them and coordinates efforts with other employees involved in or affected by the nonstandard procedures.

Completed work is evaluated for technical soundness, usefulness, and conformance with office operating requirements and needs. The methods used to produce work normally are not reviewed.

FACTOR 3, GUIDELINES

User's manuals are issued with software packages. Additionally, many users are provided with on-screen tutorials, training programs for the use of the software, and HELP functions that provide a reminder of the specific steps needed to accomplish an action, for example, how to get out of a document creation menu and into a directory menu. Such guidelines are definitive if one knows the specific actions to be taken. If, however, the specific actions needed to accomplish a task are not known, users must search tutorials or manuals for possible approaches. Although the manuals appear to provide detailed and specific guidelines, in reality:

- the manuals do not explain everything;
- it is possible to follow instructions correctly without achieving desired results, e.g., the printer may be incapable of executing a print option offered in the manual; or a functional command to flush information to the right margin may be blocked by a former command to center the information; and
- most packages provide for more than one way to perform a task, and the user must choose the most appropriate method.

Agencies may provide additional guidelines in the form of detailed step-by-step procedures for standard office automation tasks. They may also program the electronic system so that the required format for a form or report is predeveloped, or a series of functions can be executed by striking a single or relatively few function keys. This limits the extent to which employees must review manuals and select methods for accomplishing the work.

Level 3-1 -- 25 Points

Detailed procedural guidelines covering all aspects of the work are available. Typically these guidelines include locally developed equipment operating and document processing instructions, that are directly applicable to the work performed, or repetitively used portions of more general operating instructions and correspondence procedures.

Any problems encountered in selecting or applying the guidelines are referred to the supervisor or an experienced worker. Employees adhere to guidelines without deviation.

Illustrations:

- Follows step-by-step instructions to use a word processing system. Enters text from drafts in a designated format. Follows instructions for identifying and electronically storing documents and for printing hard copies. Refers any problems encountered to a lead worker.
- Follows step-by-step instructions for sending, receiving and verifying receipt of electronic mail. Sometimes sends electronic mail by modem to addressees who are not linked to the local area network. Obtains and utilizes code numbers of addressees to ensure that electronic mail reaches the appropriate destination. Follows instructions for storing and distributing information sent or received by electronic mail.

Level 3-2 -- 125 Points

Guidelines include both detailed step-by-step instructions for specific office automation tasks and more general procedural guidelines in the form of manufacturer's manuals and tutorials for users, agency correspondence procedures, style manuals, technical dictionaries, sample work products, etc.

Employees must select and apply detailed instructions for each office automation task or function, when available. For tasks not covered by specific guidelines, they must search more general guidelines to determine the specific steps to apply. Judgment is required because of the number and similarity of guidelines or the availability of alternative procedures for accomplishing a function such as choosing which editing procedure to use, depending on the nature and extent of the changes required. Situations in which existing guidelines cannot be applied are referred to the supervisor or to an automation specialist.

Illustrations:

- Processes documents involving many different styles of headings and arrangements of material within the text. Uses sample documents and correspondence manuals to determine how material should be presented. Formats documents automatically by using macros developed within the agency by computer specialists or available within the software. When such macros are not available, formats each document separately by executing each function, e.g., indentation, type font, underlining. Uses own judgment in spacing columns of tabular material.
- Processes laboratory analyses that require different formats that are either numerous or complex. To meet workload standards, recognizes variations in source documents, and applies accepted standard guidelines for format from memory and without deviation.

Level 3-3 -- 275 Points

General procedural guidelines, as described at Level 3-2, are available, but the guides normally include user's manuals and tutorials for several software packages of different types.

Much of the work requires adaptation of available guides, such as user's manuals, to meet requirements for new tasks or to solve processing problems either encountered in the employee's own work or referred by others. Judgment is required to search manuals for methods that can be applied and to adapt those methods to specific requirements. Employees also exercise initiative and judgment in deviating from existing instructions or practices to resolve operating problems or to develop more efficient processing procedures. Frequently the methods developed become guidelines for other employees in the unit. Problems that cannot be resolved by adapting existing guidelines are referred to automation specialists.

Illustrations:

- Plans and develops a systematic method for naming, identifying, and retrieving information to resolve problems in locating and retrieving electronically stored information. Documents modified procedures and distributes to others in the operating unit for their use.
- Creates new macros to simplify formatting of reports and provide for more effective response to varied requirements. Prepares and distributes a list of the new macros and provides instructions on their use to others in the operating unit.
- Modifies existing procedures that enable the importation of data from a graphics package to word processing documents during the preparation of a variety of special reports for the unit.

- Selects the most appropriate software for automating office work based on the nature of the work and the characteristics of available software types. Provides instructions for other employees on the methods and procedures for using the selected software for the type of work involved.

FACTOR 4, COMPLEXITY

The variety of textual documents processed must be evaluated in terms of the intricacy of the formats involved and the extent to which the employee must make adjustments. The establishment or maintenance of electronic records such as databases or spreadsheets must be evaluated in terms of the degree of responsibility for selecting and categorizing data entries and the functions involved with entering, retrieving, and printing data. Similarly, the variety of office automation equipment and software used must be evaluated in terms of the variety and intricacy of the functions performed with each, and the extent to which the employee makes choices as to how each is used.

Different positions can be placed at the same level for very different reasons. Of two positions at the same level, for example, one may require use of only one type of software, but in highly varied, complex, and sophisticated ways, while another position requires using a broad range of software types, but each in relatively basic or routine ways.

Applying the varying software types together in interrelated ways also adds to the difficulty of the work. For example, converting a spreadsheet into a graph and importing it electronically into a word processing document is more difficult than simply printing out the spreadsheet and attaching it to the word processing document as a separate page.

Level 4-1 -- 25 Points

The work consists of clear-cut repetitive tasks such as entering a few items of information to produce standard documents, retrieving specified items of information from an existing data management system, or acknowledging receipt of and printing electronic mail.

Employees at this level have little or no choice of action. The sequence of steps and the function keys used to activate the equipment and to perform the processing functions are prescribed in detailed instructions for each office automation task. Responses to problem conditions, e.g., need to adjust printer, are also specified in instructions or in the internal software menu for user help.

The tasks assigned are performed repetitively and are easily mastered. Any problem that is not resolved by applying the prescribed steps is readily discernible with some form of software assistance or other user help function.

Illustrations:

- Produces form letters by retrieving a standard document from a glossary and entering specified information, e.g., name, address, account number, and dollar amounts. Instructions for the sequence of steps and function keys needed to retrieve the document, position the cursor for placement of entries, and print the letters are detailed, are developed specifically for the task, and are used repetitively. Thus, the sequence of steps is normally committed to memory in a week or two. Any problem that is not resolved by following the detailed instructions is referred for assistance.
- Inputs and retrieves data from an established database to produce a few standard reports. The instructions for entering data into the appropriate data files are specific and complete. For each standard report produced, the steps for retrieving and printing the appropriate information from the database are clearly defined. The employee receives new instructions when additions, deletions, or changes to database entries or standard reporting requirements are made.

Level 4-2 -- 75 Points

The documents, formats, and specific processing functions involved require a varying number and sequence of steps and use of different functions from one assignment to another. Some assignments at this level involve using one type of software to create or edit a variety of standard documents requiring differing procedures and functions, or to process lengthy documents with a variety of format changes within each document. Other assignments at this level involve using two or more types of software, e.g., word processing and database management, to process different types of documents, paragraphs, tables, reports etc., that can be combined in a number of ways and that require extensive entry of data from drafts.

In deciding how to proceed, the employee must recognize differences in existing procedures and applications and make choices from among established alternatives. Such choices regard, for example, the specific software package to use, the specific format for different types of documents or for different sections within the same document, or the best printer type.

Processing steps and procedures required to complete assignments are varied and numerous. These steps and procedures differ in terms of the type of software used, the type of document or specific report to be produced or edited, the specific formatting required for a document, the existence of prerecorded formats, and other differences of a factual nature. In addition,

employees at this level are expected to recognize discrepancies and correct or question originators in such matters as improper formatting; errors in spelling, grammar, or punctuation; missing information; or discrepancies between the nature of the material and the processing instructions cited.

Illustrations:

- Assembles varied procurement documents, e.g., invitations for bid, notices of award, contracts, contract modifications and correspondence. Combines material from handwritten and electronic drafts with standard clauses and exhibits from glossaries. Draft material frequently includes listings and tables that require special formatting. Modifies information retrieved from glossaries to comply with a variety of special instructions.
- Performs word processing for a group of engineers. Receives most work in the form of electronic drafts through a local area network. Corrects erroneous use of word processing function keys. Standardizes headings and subheadings, margins, indentations, use of underlining, etc. Corrects grammar, spelling, and punctuation, referring questions regarding content to originator. Adjusts spacing of columns and tables for good appearance and clarity. Most assignments include lengthy technical reports that involve use of different established macros, frequent use of subscripts and superscripts, footnoting, generation of indices and tables of contents, etc., and are subject to extensive revisions.
- Maintains administrative records for the unit using an existing database. Selects information from a variety of source documents such as travel vouchers, personnel forms, time and leave cards, or training records. Enters data into established electronic records. Determines whether the entry reflects additional data or whether it requires adjusting or deleting existing data. Assembles information for standard and nonstandard reports, selecting from among established procedures for locating, retrieving, and manipulating the data to meet the requirements of the different reports, e.g., sick leave, travel costs, and training needs.

Level 4-3 -- 150 Points

The work involves using several types of software packages for different office needs. Assignments typically include a broad range of office automation duties such as:

- using word processing and graphics software to prepare reports and briefing documents, using spreadsheet software to maintain the unit's fiscal records, and using project management software to track the status of a number of projects assigned to the unit; or
- performing complex office automation duties requiring different approaches and methods from one assignment to another. This may involve using different word processing packages

to edit lengthy and complicated technical reports and resolving incompatibility problems in transferring text from one software package to another when menu options or specific software instructions are not available.

In deciding how to proceed, the employee considers many factors that are varied and that are not always clearly established. These include, for example, the nature and capability of different software types or software packages of the same type; the similarities, differences, and integration compatibilities among software types and software packages; the general operations of the unit such as the source and timing of data for reports; and the current and long term use of the subject document or report and how its use may change.

In performing the work, the employee applies judgment in considering and selecting from among many different software types in light of the range and peculiarities of the unit's information processing capabilities and requirements. The employee regularly develops methods and procedures for office automation tasks, and identifies and solves problems in existing methods or procedures.

Illustrations:

- Determines that the volume of reports and inquiries concerning an aspect of the work, e.g., travel, training, or status of correspondence, warrants automation. Identifies each category of data and combinations of data categories required to meet all reporting needs. Selects the software type, e.g., database, spreadsheet, or directory, that will best provide the search, sorting, and calculating functions needed. Develops the detailed procedures and functions needed to enter and print data in varying combinations and formats to meet reporting requirements.
- Identifies office automation duties that can be done faster and easier by creating macros. To expedite production of documents with standard formatting, sections, columns, indentations, portions of text, etc., uses the macro function to manually set up document shells or format styles that can be retrieved for use whenever needed. Creates macros that execute a sequence of functions automatically. Such macros are used to update reports, generate indices, revise tables of contents, and retrieve information from electronic records.

- Analyzes the existing correspondence tracking system maintained with word processing software. Analyzes whether information maintained and word processing software capability for producing reports with different information and formats are accurately tracking the status of correspondence and required handling. Modifies the existing tracking system to correct problems, or establishes a database management system to improve tracking methods.

FACTOR 5, SCOPE AND EFFECT

Level 5-1 -- 25 Points

The purpose of the work is to perform specific, recurring tasks required to maintain electronic records, e.g., calendars, directories, spreadsheets, and databases, and/or to produce various items, e.g., correspondence, memos, publications, manuscripts, reports, or forms, in draft or final form according to most recent data. Production usually includes steps such as: selecting and adhering to the proper format; determining the spacing and arrangement of material; making entries to and retrieving data from electronic records; and checking references, distribution requirements, grammar, punctuation, spelling.

The services performed facilitate the work of the originators of the documents or the users of the data maintained.

Level 5-2 -- 75 Points

The purpose of the work is to collect, select, organize, and provide information in oral or written form. This may involve telephone conversations, electronic mail, reports, on-line databases, etc. The work is performed in accordance with established rules, regulations, procedures, and office automation practices.

The work affects the way in which other employees document, store, receive, or transmit information, and increases the availability and usefulness of the information involved.

FACTOR 6, PERSONAL CONTACTS AND FACTOR 7, PURPOSE OF CONTACTS

Determine the appropriate level of personal contacts from levels 1 and 2 below and the corresponding purpose of contacts from levels A and B. Credit the point value found where the selected levels intersect on the chart below.

Personal Contacts

1. Employees within the immediate work unit or related support units such as points-of-contact and document originators.
2. Employees at various levels throughout the agency who are involved in or affected by integrating or changing automated office procedures.

Purpose of Contacts

- a. To exchange information about the assignment or methods to be used to complete the assignment. For example, to clarify terminology, determine priorities of projects, discuss additions or revisions, or discuss equipment capabilities.
- b. To plan, coordinate, and integrate work processes or work methods for office automation between and among related work units.

C O N T A C T S	P U R P O S E	
	a	b
1	30	60
2	45	75

FACTOR 8, PHYSICAL DEMANDS

NOTE: Regulations governing pay for irregular or intermittent duty involving unusual physical hardship or hazard are in Chapter 55, title 5, *United States Code*; and Part 550, title 5, *Code of Federal Regulations*.

Level 8-1 -- 5 Points

The work is sedentary and requires no special physical demands.

FACTOR 9, WORK ENVIRONMENT

NOTE: Regulations governing pay for irregular or intermittent duty involving unusual physical hardship or hazard are in Chapter 55, title 5, *United States Code*; and Part 550, title 5, *Code of Federal Regulations*.

Level 9-1 -- 5 Points

The work involves minimal risks and observance of safety precautions typical of office settings.