

Position Classification Standard for Management and Program Clerical and Assistance Series, GS-0344

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SERIES DEFINITION

This series includes positions involved in supervising or performing clerical and technical work in support of management analysis and program analysis, the purposes of which are to evaluate and improve the efficiency, effectiveness, and productivity of organizations and programs. The work requires a practical knowledge of the purposes, methods, and techniques of management analysis and/or program analysis and the structures, functions, processes, objectives, products, services, resource requirements, and similar features of Government programs and organizations.

This standard supersedes the standard for the Management Clerical and Assistance Series, GS-0344, issued in February 1972 (TS-9).

EXCLUSIONS

1. Classify positions that involve performing clerical or technical work to assist in providing various administrative services essential to the management, direction, and operation of an organization in the appropriate specialized series (e.g., series found in the [Job Family Position Classification Standard for Assistance Work in the Human Resources Management Group, GS-0200](#), or [Security Clerical and Assistance Series, GS-0086](#)) or, if no other series is appropriate, in the [Miscellaneous Clerical and Assistance Series, GS-0303](#). Employees in these positions work in administrative support capacities. They typically assist in providing one or more of the following services to management: procurement, travel, budget, personnel, safety, security, and property and facility management.
2. Classify principal office support positions that involve performing various general clerical and administrative duties in the [Secretary Series, GS-0318](#). Secretaries use knowledge of clerical and administrative procedures and requirements to perform duties that facilitate the work of their office such as receiving and controlling incoming correspondence, maintaining budget information, organizing and maintaining filing systems, organizing clerical processes, and gathering basic project status information.
3. Classify positions that involve performing general office clerical support work primarily requiring knowledge of office automation hardware and software to produce narrative reports and graphics, and maintain data bases, spreadsheets, and project tracking systems in the Office [Automation Clerical and Assistance Series, GS-0326](#).
4. Classify positions in the [Management and Program Analysis Series, GS-0343](#), when they involve supervising or performing management analysis or program analysis work, requiring an in depth knowledge of agency missions and policies, agency programs and activities, management principles and processes, and the analytical and evaluative methods and techniques for assessing program development or execution and improving organizational effectiveness and efficiency.

Some management analysts and program analysts perform work similar to that performed by management assistants and program assistants. However, they do so in a trainee or developmental capacity in preparation for higher level analytical assignments. (See the Classifier's Handbook for additional information on distinguishing between administrative and support series.)

5. Classify positions that involve performing clerical and technical work in support of budget analysis and administration in the [Budget Clerical and Assistance Series, GS-0561](#). Although some employees in the GS-0344 Series perform similar duties, they do so to assist in planning, monitoring, and evaluating the overall efficiency and productivity of organizations and the success of programs in attaining their goals and objectives.
6. Classify positions that involve performing work to collect, process, compile, compute, analyze, edit, and present statistical data using a primary knowledge of statistical methods, procedures, and techniques in the [Statistical Assistant Series, GS-1531](#).

OCCUPATIONAL INFORMATION

Employees in this series perform clerical and technical work in support of management analysis and/or program analysis. The purpose of management and program analysis is to analyze, evaluate, and improve the efficiency, effectiveness, and productivity of organizations and programs and to provide managers with objectively based information for making decisions on the administrative and operational aspects of agency management and program operations. These administrative and operational aspects include organizational or program structures, functions, objectives and goals, processes, products, services, performance requirements, projects, and resources.

Management clerks and assistants apply clerical and technical procedures, methods, and techniques to support management analysis functions and processes. Management analysis involves analyzing, evaluating, and improving the efficiency of internal administrative processes, organizations, or management. This includes studying and recommending improvements to organizational structures, processes, and workflow, and in the use of staff, funding, and other resources. Management analysis also involves developing, evaluating, and advising on the methods and policies for providing administrative or information management systems to agencies, such as records, directives, mail, or forms management systems.

Program clerks and assistants apply clerical or technical procedures, methods, and techniques to support program analysis functions and processes. Program analysis involves planning, analyzing, and evaluating the effectiveness of line or operating programs. This includes developing agency program objectives, identifying required resources (e.g., staff, money, and materials), measuring program progress and quality of service, and devising actions to resolve program problems in meeting goals and objectives. (See the standard for the [Management and Program Analysis Series, GS-0343](#), for additional explanations and examples of management and program analysis work.)

The employees in this series typically work in offices where management analysts or program analysts are also employed. Their primary function is to perform the routine, procedural, or standard assignments that support management or program analytical work. However, physical proximity to management or program analysts is not a requirement. A position may be classified to this series without being located in a management or program analysis office, so long as the work of the position requires skills and knowledge characteristic of this series and involves the types of duties contemplated in this standard.

Employees in this series perform many different kinds and combinations of work at different organizational levels. Some employees perform the basic procedural tasks needed to complete management or program analysis projects and processes. For example, they--

- maintain, gather, and compile records of organizational and workflow charts, staffing levels, mission and function statements, program resource use and availability, and internal audit reports;
- review reorganization requests, performance and management indicator reports, suggestions for program improvements, and other similar management and program analysis documents for appropriate format, distribution, and inclusion of required information and explain reporting procedures and requirements to operating officials;
- compile and distribute reports on proposed program goals, budgets, staff levels, and performance criteria to operating officials for review and comment;
- make and verify routine calculations such as standard cost estimates, production rates, staff hours, and workload figures; or
- prepare charts, graphs, and narrative information for management or program analysis reports from material provided by higher level employees.

Some employees complete limited, uncomplicated management or program analysis projects, or segments of larger analytical projects or studies under the direction of higher level employees. This may include collecting data, detecting and evaluating trends or problems, and/or identifying solutions. For example, they--

- monitor and review past and present program resource use and forecasted requirements to identify trends, discrepancies, and problems requiring further study by higher level employees;
- study reports on program workload figures and production rates and determine the extent of deviation from established goals and requirements;
- interview and observe operating personnel to collect information on and produce charts showing workflow patterns, lines of authority, or organizational layout; or

- compare staff levels in clerical work units to established staffing standards to identify overstaffed or understaffed work units and recommend solutions to assure compliance with requirements.

Some employees work independently to control and maintain installed administrative or information management systems, such as forms, records, mail, directives, or publications management systems. Management analysts or other higher level employees develop, monitor, and refine the policies and procedures for providing these systems to organizations. Employees apply these policies and procedures to--

- assist operating personnel in understanding and using the systems;
- identify problems or deviations in system use;
- apply or adapt established guidelines to correct problems;
- make operational changes or improvements within the policy or structural limitations of the systems; and
- identify and refer serious problems or questions, requiring detailed analysis or extensive system modification (i.e., beyond the limits of established policies), to the responsible management analyst or higher level employee.

Most employees in this series use one or more automated systems to perform their duties. This includes word processing, spreadsheet, data base, project management, graphic design, and management information systems. In addition to the primary requirement for knowledge of the purposes and functions of management or program analysis and of management or program operations, some employees in this series use knowledge of automated systems to--

- enter, search for, edit, and extract data and information;
- create statistical diagrams, organizational and workflow charts, and other graphics;
- monitor program status and funding use;
- calculate figures such as production rates and staff hours; and/or
- create models of offices to be used in workflow, production, space use, and other types of studies.

TITLES

Management Clerk is the title for all positions GS-01/04 that primarily involve performing work in support of management analysis functions and processes.

Management Assistant is the title for all positions GS-05 and above that primarily involve performing work in support of management analysis functions and processes.

Program Clerk is the title for all positions GS-01/04 that primarily involve performing work in support of program analysis functions and processes.

Program Assistant is the title for all positions GS-05 and above that primarily involve performing work in support of program analysis functions and processes.

Management and Program Clerk is the title for all positions GS-01/04 that primarily involve performing work in support of a mix of management and program analysis functions, when neither is predominant.

Management and Program Assistant is the title for all positions GS-05 and above that primarily involve performing work in support of a mix of management and program analysis functions, when neither is predominant.

Prefix the term "Lead" or "Supervisory" to the above titles for positions that meet the criteria in the [General Schedule Leader Grade Evaluation Guide](#) or [General Schedule Supervisory Guide](#).

Supplement the prescribed titles with parenthetical titles for positions requiring further identification of their duties or responsibilities for recruitment or other purposes. Work that requires a fully qualified typist, stenographer, or data transcriber, or that requires knowledge of general office automation procedures and competitive level proficiency in typing must be titled using the appropriate parenthetical titles. See the [Introduction to the Position Classification Standards](#) for further information concerning the use of parenthetical titles.

EVALUATING POSITIONS

Evaluate positions using the factor level descriptions and assigned point values in this standard. Use the [Primary Standard](#) and related FES standards to assist in evaluating positions that may warrant higher or lower factor levels than those described. See the [Classifier's Handbook](#) and the [Introduction to the Position Classification Standards](#) for more information.

Apply the [General Schedule Leader Grade Evaluation Guide](#) or the [General Schedule Supervisory Guide](#) to positions that meet the criteria for coverage by these guides.

Evaluate the office automation duties of positions in this series by applying the criteria in the [Office Automation Grade Evaluation Guide](#).

Evaluate positions that involve performing management clerical and assistance work or program clerical and assistance work in conjunction with work classifiable in another series using the instructions for evaluating mixed series positions in the [Classifier's Handbook](#).

The grading criteria in this standard may be used to determine the grades of positions in other series when the nature of the work is equivalent to the intent of the factor level descriptions and work illustrations in this standard.

GRADE CONVERSION TABLE

Total the points from the evaluation factors and convert to General Schedule grades as follows:

GS Grade	Range
4	655-850
5	855-1100
6	1105-1350
7	1355-1600

FACTOR LEVEL DESCRIPTIONS

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

Level 1-3 -- 350 points

The work at this level requires a practical knowledge of a body of established clerical or technical procedures and requirements related to the assigned management and/or program analysis duty or task. It also requires a general knowledge of one or a few similar, established, and relatively stable management or program operations. In addition, some of the work requires one or more of the following--

- skill in compiling readily available data from prescribed sources and recognizing and correcting obvious discrepancies and data omissions.
- knowledge of the basic principles of arithmetic to use established formulas to make routine calculations such as standard production rates, staff hours, or funding use.
- familiarity with one or more established automated systems to enter, correct, and retrieve factual information, compile reports, produce charts and graphs, or monitor project or program status.

Employees use this knowledge to perform a full range of standard duties, tasks, or assignments and to resolve recurring problems.

Illustrations:

- Employees use knowledge of basic form design techniques and procedures to explain standard design requirements to users for single purpose, local-use forms. They design forms in accordance with established guidelines and from rough outlines provided by users. The guidelines and outlines define requirements including the appropriate sequence of entries, grouping of related data, instructions for use, items to cover, and size and line spacing for making entries by computer printers and other office machines. Employees maintain records of all forms used in the organization.
- Employees perform a full range of standard clerical duties to assist higher level employees in conducting organizational analysis studies. For example, they use a basic knowledge of the processes and procedures of the studies to--
 - ! compile data from questionnaires and notes taken during interviews conducted by higher level employees;
 - ! search historical files for readily available background information such as recent staff or function changes, organizational charts, mission and function statements, and position descriptions;
 - ! check reports and other documents for correct office and position titles, codes, and symbols, and verify discrepancies with the appropriate office or individual;
 - ! design and produce organizational and workflow charts using graphic design software based on information provided by higher level employees;
 - ! compute or verify the accuracy of standard work measurement data and correct obvious mathematical errors; and/or
 - ! maintain records of organizational and workflow charts, function statements, and staff levels.
- Employees assist higher level employees in evaluating the success of programs in attaining their production goals. Employees receive weekly production reports from various field offices that outline the quantity and types of claims processed. They review the reports for clear errors such as the use of improper reporting procedures, inaccurate computations, or missing information. Employees compare current data to reports of previous production rates and notify higher level employees concerning specific offices or types of claims with sharp increases or decreases in production. At the request of higher level employees, they also extract information from the data base such as per claim processing times and costs.
- Employees perform a range of clerical duties to assist higher level employees with conducting program audits. They maintain established data base records of audit cases including case status, staff hours spent on each case, travel costs incurred, and audit

report due dates. Employees answer inquiries from audit managers, program managers, and similar personnel concerning case status and basic program auditing procedures. At the request of higher level employees, they compile various types of background information readily available in files such as reports from previous audit cases or regulations governing the program area under study. They review completed audit reports to ensure compliance with established formats and inclusion of required information such as accurate audit case control numbers. They distribute audit reports to established reviewing officials.

Level 1-4 -- 550 points

The work at this level requires knowledge of an extensive body of management and/or program analysis technical rules, guidelines, regulations, and precedents. It also requires knowledge of the basic objectives and policies governing various management or program operations.

Some work also requires skill in applying basic data gathering methods, such as standard interviewing or surveying techniques, to collect various types of factual information. Some employees also apply knowledge of the standardized processes and procedures for evaluating management or program operations to perform duties such as planning the steps to take to complete assignments, identifying problems from collected data, and selecting solutions from alternatives in guidelines and precedent cases.

Some employees also use writing skills to prepare clear, concise reports that describe the data collection techniques and other processes and procedures used, conditions of management or program operations, and recommended improvements.

Employees apply this knowledge to individual, nonstandard technical assignments whether the nature of these assignments stems from a changing mix of work or represents diversity within a defined management or program operation. Assignments may involve limited aspects of higher level work.

Illustrations:

- Employees control the maintenance and development of various administrative directives using knowledge of the established content and format requirements and the purposes and functions of the organizations involved. They review proposed directives to ensure proper arrangement of material, consistency with existing directives, and proper distribution. They review existing directives to detect and eliminate conflict, overlap, and duplication and ensure only current material is retained. They devise ways to improve directives by simplifying, consolidating, or eliminating them. Employees discuss recommendations for changes with the using offices in order to gain concurrence.
- Employees monitor the management of records in an organization by distributing questionnaires to offices asking them for lists of file numbers and corresponding subject content and, using knowledge of agency records management regulations, reviewing the completed questionnaires to ensure material is filed under proper record numbers.

Periodically, employees inspect the files of these offices to ensure all records are stored and labeled correctly, contain current material, and are not duplicated. If problems exist, they explain procedures to the office's records coordinator including how to number and store paper, electronic, and other types of records; when to dispose of or transfer records to central holding areas; and how and where to store or destroy classified records.

- Employees use knowledge of the objectives and regulations governing staffing standards and allowances to verify the staff levels of clerical work units. They interview operating personnel to collect information on the quantity, kind, and level of positions in the units. They compare this information to authorized staffing levels to identify unapproved or vacant positions and other similar deviations from established requirements. Employees interview work unit supervisors to determine if the positions are needed based on current or potential office workload. They provide reports to higher level employees describing the problems and recommendations for maintaining or eliminating the positions.
- Employees monitor and study the workflow of clerical work units. They interview and observe work unit personnel to collect information concerning duties of employees, lines of supervision, flow of work, and problems encountered. From the collected information, they design office layouts and workflow diagrams. They study this information and the current clerical procedures to determine the possible causes of workflow problems. Employees review established guidelines and precedent cases to identify alternative solutions such as revising procedures, redesigning office space, or using new equipment. They provide reports to higher level employees that describe the problems, possible causes, and alternative solutions.
- Employees use knowledge of the purposes, objectives, and requirements of various organizational programs and projects to track progress in meeting objectives and use of resources. For each project, employees establish and maintain data base records of forecasted project milestones and available funding. As projects progress, they review the funding, labor hours, and equipment time used and project milestones met by comparing monthly project status reports to established resource allowances and performance requirements. Employees request explanations from project managers or contractors when milestones or requirements are not met or if funds are unavailable. They prepare reports for higher level employees describing problems that are recurring or causing significant delays or costs, the corrective actions taken, and the need for additional time or resources. When projects are completed, employees calculate the total amount of funding, staff hours, and equipment time used, and salary, material, and other costs incurred. They also produce graphs showing planned and actual project milestone dates. They submit this information to higher level employees for further study.

FACTOR 2, SUPERVISORY CONTROLS

Level 2-2 -- 125 points

The supervisor or higher level employee provides general standing instructions on what is to be done, procedures and methods to follow, data and information required, quality and quantity of work expected, and deadlines. They provide additional, specific instructions for new, difficult, or special assignments including suggested procedures, sources of information, or reporting formats and techniques.

The employee independently carries out recurring management and/or program analysis clerical or technical tasks or assignments without specific instructions. For example, the employee maintains established records of management or program analysis data and reports, provides standard explanations of procedures and requirements, identifies clear errors in data, and compiles management or program analysis data into prescribed formats. The employee refers problems and unfamiliar situations not covered by instructions to the supervisor or higher level employee for further guidance. At this level, some employees work more independently than others, receiving little day-to-day supervision. However, their work is limited or controlled by readily applicable instructions or procedures that specifically describe how the work is done and the kind of adaptations or exceptions that can be made. Supervisory instruction is necessary only for new or special assignments.

The supervisor or higher level employee assures that finished work and methods used are technically accurate and in compliance with established instructions, methods, procedures, and deadlines. For example, the supervisor checks recurring reports for inclusion of required information, accuracy of calculations and other data, and adherence to prescribed formats. Review of work increases with more difficult assignments if the employee has not previously performed similar assignments.

Level 2-3 -- 275 points

The supervisor or higher level employee defines the objectives, priorities, and deadlines for projects or assignments and assists the employee with unusual situations, problems, or studies that do not have clear precedents.

The employee plans and carries out the successive steps of management or program analysis technical projects and assignments and handles problems and deviations in accordance with instructions, policies, previous training, or accepted practices. For example, the employee independently determines the types and sources of management or program information required for reports, the nature and extent of deviations from established management or program requirements, and whether standard data gathering techniques are appropriate for assignments.

The supervisor or higher level employee evaluates reports and other completed work for technical soundness, appropriateness of conclusions or recommendations, consistency, relevance

of support material, and compliance with policies and requirements. The methods used in arriving at the end results are not reviewed in detail.

FACTOR 3, GUIDELINES

Level 3-2 -- 125 points

A number of established instructions and procedures for doing the work are readily available and clearly applicable to most assignments. Typical guidelines include organizational operating procedures; instructions and procedures for management or program analysis functions and processes; automated system procedures and requirements; forms, records, or other administrative or information management procedures and requirements; program audit reports; data on program resource use and productivity; staffing allowances; organization and workflow charts; mission and function statements; program goals and objectives; and similar information.

The number and similarity of guidelines and work situations require the employee to use judgment in locating, selecting, and applying the most appropriate instructions, references, or procedures to management or program analysis clerical or technical assignments. The employee may make minor deviations in guidelines to adapt to specific tasks such as when questioning operating officials concerning errors or discrepancies in reports. The employee refers situations involving significant deviations from established guidelines or issues and problems requiring significant judgment to the supervisor or higher level employee for guidance or resolution.

Level 3-3 -- 275 points

Because of the unique or complicating characteristics of the assignments, guidelines lack specificity or are not completely applicable to the work requirements, circumstances, or problems. For example, standard procedures for tracking program or project status require frequent modifications due to fluctuations in budgets, production goals, or workload and established records or forms management practices require adaptation for consistent use by organizations with different functions and administrative needs.

The employee uses judgment in interpreting and adapting guidelines to apply to specific situations such as evaluating the appropriateness of justifications for changes in clerical staffing levels; determining the cause or extent of deviations from established production rates or resource use; or determining whether an organization's proposed directives, publications, or functional statements are within the scope of their established delegated authority or assigned function. The employee analyzes the results of applying guidelines and recommends changes to them.

FACTOR 4, COMPLEXITY

Level 4-2 -- 75 points

The work consists of duties involving related procedures, processes, or methods to perform individual management or program analysis clerical or technical assignments or tasks. For example, the employee may--

- review established formats and defined requirements for creating single purpose forms, design the forms in accordance with standard guidelines, and distribute the forms to prescribed offices;
- review directives, staffing reports, or organizational change requests for compliance with standard formats or schedules and inclusion of required information; verify clear discrepancies with originating offices; and correct errors;
- search prescribed sources for data, and compile and arrange data in standard formats for projects or reports; or
- review routine program production reports and identify clear discrepancies, trends, or problems.

The employee decides what needs to be done by identifying easily recognizable differences in the basic characteristics and nature of one or a few similar, stable work units, program areas, and/or management or program operations. The operations involve easily identifiable steps and procedures; standard plans, schedules, calculations, report formats, and requirements; or clear-cut processes, structures, and workflow. The employee identifies the basic instructions and procedures to follow from among a few established procedural alternatives related to the specific function or task.

The employee considers the nature of the task or duty, basic purposes and other characteristics of the work units and operations involved, or readily available sources of information to complete routine or standard assignments such as compiling and computing data, identifying trends or problems, and explaining procedures.

Level 4-3 -- 150 points

The work consists of various duties, projects, or assignments involving different and unrelated management or program analysis technical processes and procedures. Assignments or projects involve--

- various actions or steps that are not completely standardized or prescribed in instructions, guidelines, or precedent cases;
- adaptation or modification of established procedures and methods;

- various types and sources of information;
- nonrecurring problems, trends, or issues;
- management or program operations with varying or changing conditions (e.g., work units or program areas with different functions or requirements or with periodic changes in workloads, budgets, staff levels, work processes, or program objectives); or
- similar features.

Examples of projects and assignments include--

- reviewing various new and existing administrative directives to determine if they conflict or can be consolidated with others that are similar in content, purpose, and distribution;
- studying the work processes of clerical work units with different functions and objectives and identifying areas requiring improvements;
- studying changes in the production rates of various offices to determine the nature and extent of the deviations; or
- monitoring and studying the progress of extensive projects with different schedules and resource allowances to identify missed project milestones or to forecast resource availability.

The employee decides what needs to be done by considering the characteristics, practices, objectives, and interrelationships of various work units, program areas, and/or management or program operations. The employee studies and analyzes issues such as the nature of the assignments; the various sources of information; the nature and requirements of the work units, program areas, or operations; the objectives of management or program analysis processes and techniques; and the applicability of precedent cases, rules, and regulations.

The employee selects, adapts, and applies the most suitable practices, procedures, methods, and precedents to collect and analyze various types of information, formulate conclusions, define needs, and/or make recommendations for resolving problems to higher level employees.

FACTOR 5, SCOPE AND EFFECT

Level 5-2 -- 75 points

The purpose of the work is to apply specific rules, regulations, or procedures to perform a full range of clerical or technical tasks, duties, and assignments. These assignments typically comprise a complete segment of a broad management or program analysis project, study, or process.

The work affects the accuracy, reliability, quality, and timeliness of management or program analysis products, recommendations, studies, projects, and processes. Some of the work affects the consistent use and control of publications, forms, records, directives, and other systems in local offices and organizations with similar administrative or information management needs.

Level 5-3 -- 150 points

The purpose of the work is to plan and carry out assignments or projects to improve the efficiency and productivity of organizations or program operations. Employees use established methods, practices, and criteria to identify, study, and recommend solutions for resolving conventional problems or questions.

The work affects the design of organizational structures and workflow; the evaluation and improvement of operating program efficiency and effectiveness; the use and management of staff, funding, equipment, and other resources; and the design or use of similar management or program operations. Some of the work also affects the management of administrative or information systems throughout a wide range of offices or organizations with different administrative or information management needs.

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

Match the level of regular and recurring personal contacts with the directly related purpose of the contacts and credit the appropriate point value using the chart below.

Persons Contacted

1. Contacts are with employees within the immediate organization, office, project, or work unit, and in related support units. Contacts typically include other support personnel, management analysts, program analysts, administrative officers, or managers.

AND/OR

Contacts are with members of the general public in very structured situations. For example, the employee may contact representatives from printing companies to determine shipping dates or status of printing orders.

- 2. Contacts are with employees in the same agency, but outside the immediate organization. Persons contacted are managers, employees, and other representatives of the programs involved or organizations served.

AND/OR

Contacts are with members of the general public, as individuals or groups, in moderately structured settings. For example, the employee may contact contractors to obtain justifications for project delays.

Purpose of Contacts

- a. The purpose of the contacts is to obtain, clarify, or provide facts or information.
- b. The purpose of the contacts is to plan, coordinate, or advise on work efforts; discuss significant findings; or resolve operating problems by influencing or motivating individuals or groups who are working toward mutual goals.

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

Level 8-1 -- 5 points

The work requires no special physical demands. It may involve some walking, standing, bending, or carrying of light items.

FACTOR 9, WORK ENVIRONMENT

Level 9-1 -- 5 points

The work is performed in an office or similar setting requiring normal safety precautions against everyday risks or discomforts.