

U.S. Office of Personnel Management
Office of Merit Systems Oversight and Effectiveness
Classification Appeals and ELSA Programs



Atlanta Oversight Division
75 Spring Street, SW., Room 972
Atlanta, GA 30303

**Classification Appeal Decision
Under Section 5112 of Title 5, United States Code**

Appellant: {appellant}

Agency classification: Training Technician (Office Automation)
GS-1702-5

Organization: [Air Force]

OPM decision: Training Technician (Office Automation)
GS-1702-5

OPM decision number: C-1702-05-01

Kathy W. Day
Classification Appeals Officer

Date: 5/14/98
rdrive # 1702051.red

As provided in section 511.612 of title 5, Code of Federal Regulations, this decision constitutes a certificate that is mandatory and binding on all administrative, certifying, payroll, disbursing, and accounting officials of the government. The agency is responsible for reviewing its classification decisions for identical, similar, or related positions to ensure consistency with this decision. There is no right of further appeal. This decision is subject to discretionary review only under conditions and time limits specified in the Introduction to the Position Classification Standards, appendix 4, section G (address provided in appendix 4, section H).

Decision sent to:

[appellant]

[Civilian Personnel Officer]

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Introduction

On March 3, 1998, the Atlanta Oversight Division, Office of Personnel Management (OPM), accepted an appeal for the position of Training Technician (Office Automation), GS-1702-5, at the Headquarters Air Force Reserve, Professional Development Center, Professional Education Division, [city and state] is requesting that her position be changed to Training Technician (Office Automation), GS-1702-6 or 7.

The appeal has been accepted and processed under section 5112(b) of title 5, United States Code. This is the final administrative decision on the classification of the position subject to discretionary review only under the limited conditions and time outlined in part 511, subpart F, of title 5, Code of Federal Regulations.

General issues

The appellant was reassigned from Support Services Assistant (Office Automation), GS-303-5, to Training Technician (Office Automation), GS-1702-5, on February 15, 1998. The appellant states that her name has been on two GS-1702 promotion rosters since December 1997, and she qualifies as a GS-1702-7.

The appellant believes that she should receive retroactive pay from May 1996 to the present. However, the U.S. Comptroller General states that an “. . . employee is entitled only to the salary of the position to which he is actually appointed, regardless of the duties performed. When an employee performs the duties of a higher grade level, no entitlement to the salary of the higher grade exists until such time as the individual is actually promoted Consequently, back pay is not available as a remedy for misassignments to higher level duties or improper classifications.” (CG decision B-232695, December 15, 1989)

Position information

The appellant is assigned to position number 39554. The appellant, supervisor, and agency certified to the accuracy of the position description.

The appellant serves as the point of contact and provides administrative and clerical support for the professional development education and training programs for the Air Force Reserve. Officers and managers are required to complete two courses, an orientation class and an Air Reserve Technician (ART) course over a 2-year period. The appellant spends 60 percent of her time responding to requests for course availability, tracking availability and eligibility requirements, assisting attendees with training choices, determining eligibility, compiling a list of attendee names, maintaining the automated files and records, preparing course material, ensuring that the classrooms are adequate, and coordinating travel and lodging arrangements for attendees. The remainder of the appellant's time is spent researching files for data, verifying information, resolving cancellation conflicts, and preparing reports in appropriate formats. She also prepares travel orders and training forms, maintains the filing system, answers telephone calls, and greets visitors.

The appellant works under the general supervision of the program manager who assigns work in terms of objectives, priorities, and deadlines. The appellant works independently and plans assignments according to accepted practices. She resolves most conflicts and uses judgment in applying guides to specific cases. The work is checked for appropriateness and conformance to policy.

Standards determination

Education and Training Series, GS-1702, October 1991.

Personnel Clerical and Assistance Series, GS-203, November 1985.

Grade Level Guide for Clerical and Assistance Work, June 1989.

Office Automation Grade Evaluation Guide, November 1990.

Series determination

The agency placed the position in the GS-1702 series. The appellant does not disagree with the series. The GS-1702 series covers nonprofessional work of a technical, specialized, or support nature that requires practical knowledge of program objectives, policies, procedures, or pertinent regulatory requirements affecting the particular education or training activity. Employees apply a practical understanding or specialized skill and knowledge of the activity involved. The appellant performs one grade interval technical duties that facilitate the work of the Air Force Reserve Command, Professional Education Division. The appellant's work requires a practical knowledge of the Air Force Reserve education program and its objectives, policies, procedures, and requirements.

Title determination

The agency determined the title to be Training Technician (Office Automation). Most positions covered by this series involve one grade interval aid and technician work in the field of education and training. Employees in these positions perform support duties that facilitate the work of professional education personnel in education and training activities. Training Technicians work in training programs and apply a practical understanding of the training program and its objectives, policies, procedures, and requirements. They also apply a specialized knowledge of and skill in particular aspects of the program.

Training Technician is the authorized title for nonsupervisory positions at grades GS-4 and above involved in training support. Since the position also requires office automation duties and the skill of a qualified typist, that requirement is reflected in the parenthetical title *Office Automation*.

The correct title of the position is *Training Technician (Office Automation)*.

Grade determination

Nonsupervisory positions in the GS-1702 series are evaluated by the criteria in the standard or guide most closely related to the type of work performed, since the GS-1702 standard does not contain grade level criteria of its own. No other series in the GS-1700 occupational family covers technical work. However, both the Personnel Clerical and Assistance, GS-203, series standard and the Guide for Clerical and Assistance Work provide criteria appropriate for evaluating technical work for positions with duties and qualification requirements like the appellant's. The GS-203 standard is presented in two parts: Part I covers personnel clerical work; Part II covers personnel assistance work. Because Part I of the standard specifically covers clerical work in employee development, a field close to the appellant's, it is preferred in this case over the more general criteria in the Guide for Clerical and Assistance Work. The Office Automation work will be evaluated separately by reference to the Office Automation Grade Evaluation Guide.

Personnel Clerical and Assistance standard, GS-203

The Personnel Clerical and Assistance standard, GS-203, is in the Factor Evaluation System (FES) format. Under the FES, positions are placed in grades on the basis of their duties, responsibilities, and the qualifications required as evaluated in terms of nine factors common to nonsupervisory General Schedule positions.

A point value is assigned to each factor based on a comparison of the position's duties with the factor-level descriptions in the standard. The factor point values mark the lower end of the ranges for the indicated factor levels. For a position factor to warrant a given point value, it must be fully equivalent to the overall intent of the selected factor-level description. If the position fails in any significant aspect to meet a particular factor-level description in the standard, the point value for the next lower factor level must be assigned, unless the deficiency is balanced by an equally important aspect which meets a higher level. The total points assigned are converted to a grade by use of the grade conversion table in the standard.

Under FES, positions which significantly exceed the highest factor level or fail to meet the lowest factor level described in a classification standard must be evaluated by reference to the Primary Standard, contained in Appendix 3 of the Introduction to the Position Classification Standards. The Primary Standard is the "standard-for-standards" for FES.

The appellant specifically contests the agency's determinations for Factors 1, 2, 4, 5, and 6. This decision will, therefore, provide an analysis of those five factors only. The remaining factor level determinations made by the agency and not contested by the appellant will not be discussed further in this decision since we have reviewed each factor and agree with the accuracy of the agency determination.

Factor 1 - Knowledge Required by the Position:

This factor measures the nature and extent of information or facts that a worker must understand to do acceptable work, such as the procedures, practices, rules, policies, theories, principles, and concepts; and the nature and extent of the skills needed to apply this knowledge. The agency credited Level 1-3. The appellant believes level 1-4 is correct.

At Level 1-3, the work involves knowledge of a body of standard procedures and terminology related to employee development activities to perform a range of clerical duties such as processing training requests and training contracts. The employee reviews the requests for completeness, codes data, coordinates notification and changes in schedules of employees, obtains course evaluations, and verifies that training is complete. Also at this level, the employee keeps records of employee training, reserves space for training, assembles handouts, obtains equipment needed for the training, makes travel arrangements, and maintains folders on employees.

Level 1-3 is met. The appellant performs many duties and responsibilities that are administrative and clerical in nature on a routine and recurring basis to support the operation of the education division. The appellant's work requires knowledge of standard procedures to perform clerical duties such as making course arrangements for officers and managers to attend required training (orientation and ART courses) over a 2-year period. The appellant notifies and verifies participation, makes travel and lodging arrangements for participants, verifies that the training requests are complete, prepares folders and class material for courses, requests billeting support, coordinates room arrangements for courses, makes sure equipment is adequate, and selects menus when meals are included, etc.

At Level 1-4, the work is more technical and involves knowledge of specialized methods, regulations, or principles to perform limited technical work of a noncontroversial nature, requiring skill in conducting recurring types of interviews to develop facts, analyzing readily understood technical subjects, or composing narrative reports and summaries. Work at this level involves a practical knowledge of employee development principles and potential subject-matter resources to perform limited technical support work such as: selecting trainees on the basis of relatedness of subject matter, identifying and contracting subject-matter experts for instructors, reviewing catalogs and contacting libraries for suitable films, ascertaining that employees have prerequisites for courses, revising questionnaires to survey employee interest, interviewing interns, and substituting similar courses to resolve conflicts in schedules.

Level 1-4 is not met. There is no evidence in the appeal record of the appellant performing duties such as interviewing, analyzing subject matter, or composing narrative reports and summaries as described at this level. The appellant's work involves well-established procedures where she selects a course of action from a limited number of possibilities. The courses with which the appellant deals are very limited in subject matter, have very specific prerequisites, and the student population is limited. She is not required to have a knowledge of the principles of employee development or training in order to perform her duties. She does not participate in selecting instructors, films, or any material used in the courses; is not required to analyze courses in order to make appropriate

substitutions; is not involved in revising student surveys; nor does she evaluate potential students' backgrounds in relation to various courses involving different subject matter to determine placement in a particular course. The intent of this level is not met and cannot be credited.

Level 1-3 is credited for 350 points.

Factor 2 - Supervisory Controls:

This factor covers the nature and extent of direct or indirect controls exercised by the supervisor, the employee's responsibility for carrying out assignments, and how completed work is reviewed. The agency credited Level 2-3. The appellant believes Level 2-4 is correct.

At Level 2-3, the highest level described in the standard, the supervisor makes assignments by defining objectives, priorities, and deadlines and assists the employee with unusual situations that do not have clear precedents. The employee plans and carries out the successive steps and handles problems and deviations in the work assignments in accordance with instructions, policies, previous training, or accepted practices in the occupation. Completed work is usually evaluated for technical soundness, appropriateness, and conformity to policy and requirements. The methods used in arriving at the end results are not usually reviewed in detail.

Level 2-3 is met. The appellant plans and completes her work in accordance with instructions, policies, procedures, and previous training. She resolves conflicts such as lodging arrangements, seating arrangements for the courses, and cancellations of attendees and speakers. The appellant functions under very general instructions from the supervisor and performs assignments without assistance from the supervisor or other employees. The written aspects of the work are reviewed for technical soundness, appropriateness, and conformity to policy and requirements.

At Level 2-4, according to the Primary Standard, the supervisor sets the overall objectives and resources available. The employee and supervisor, in consultation, develop deadlines, projects, and work to be done. The employee, having developed expertise in the line of work, is responsible for planning and carrying out the assignment, resolving most of the conflicts that arise, coordinating the work with others as necessary, and interpreting policy on own initiative in terms of established objectives. In some assignments, the employee also determines the approach to be taken and the methodology to be used. Completed work is reviewed only from an overall standpoint in terms of feasibility, compatibility with other work, or effectiveness in meeting requirements or expected results.

The appellant does not meet the full intent of Level 2-4. The appellant compares her responsibilities for planning the yearly budget for submission, requesting the funding and scheduling managers' course dates to this level. She also states that she resolves most conflicts. While the appellant works with considerable freedom and handles most problems, because of the limited nature of her responsibilities, she does not encounter the scope of complex problems envisioned at this level on a regular or recurring basis. Level 2-4 describes greater independence and authority to address unusual problems

and conflicting priorities in conjunction with assignments of greater breadth and complexity than found in this position.

Level 2-3 is credited for 275 points.

Factor 4 - Complexity:

This factor covers the nature, number, variety, and intricacy of tasks, steps, processes, or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work. The agency credited Level 4-2. The appellant believes Level 4-3 is appropriate.

At Level 4-2, the work consists of various related steps, processes, or methods in a personnel function, such as: performing a range of varied office clerical tasks in support of a personnel specialty, including subject-matter procedures, preparation of recurring reports from information in the files, screening of mail and visitors, completion of room arrangements for seminars and panel meetings, etc. Decisions regarding what needs to be done involve various choices requiring the clerk to recognize the existence of and differences among clearly recognizable situations.

Level 4-2 is met. The appellant performs a full range of procedural duties related to clerical and administrative responsibilities in support of the professional education development program. According to the appellant, the courses average approximately two a month because the work overlaps. The same methods are used each time, i.e., compiling a list of attendees for the courses, gathering course material, making folders, making travel and lodging arrangements, etc. She determines the proper course of action based on established priorities, commitments, and knowledge of appropriate policies and programs, and the differences in easily recognizable situations.

At Level 4-3, the work consists of different and unrelated processes and methods such as is normally required for a full range of official personnel actions (accessions, separations, pay changes, and Federal employee benefits) for a block of assigned organizations. Decisions regarding what needs to be done involve many considerations in a variety of different situations which require different processing treatment.

Level 4-3 is not met. The appellant's assignments typically involve standard or routine procedures which are clearly applicable. While this position performs a variety of duties, they are related in nature. She resolves recurring problems, and because of the limited nature of her responsibilities, there is no requirement for her to choose a course of action from among a great many different possibilities.

Level 4-2 is credited for 75 points.

Factor 5 - Scope and Effect:

This factor covers the relationship between the nature of the work, as measured by the purpose, breadth, and depth of the assignment, and the effect of work products or services both within and outside the organization. The agency credited Level 5-2. The appellant believes Level 5-3 is correct.

At Level 5-2, the highest level described in the standard, the purpose of the work is to apply or explain personnel rules, practices, or procedures in performing an assigned block of clerical work or in serving as the principal clerk for a unit. The work product or service usually affects the accuracy and reliability of further processes, e.g., explanations to job applicants result in their being considered further for employment or promotion; correction of discrepancies on personnel action requests affects the accuracy of personnel actions; processing of official personnel actions affects the accuracy of payrolls.

Level 5-2 is met. The purpose of the appellant's work is to provide assistance in support of the training and education courses for the command. She is the contact person for providing basic course information, such as availability, for making travel arrangements, and for handling other logistical requirements. This requires the application of established regulations, practices and procedures. The work affects the ability of the command to provide training and contributes to the quality of the work efforts for the command.

At Level 5-3, according to the Primary Standard, the work involves a variety of conventional problems, questions, or situations in conformance with established criteria. The work product or service affects the design or operation of systems, programs, or equipment; the adequacy of such activities as field investigations, testing operations, or research conclusions; or the social, physical, and economic well being of persons.

Level 5-3 is not met. The appellant's work does not impact the design or operation of systems or programs nor does her work have the broad reaching effect of the activities described at this level, e.g., research conclusions.

Level 5-2 is credited for 75 points.

Factor 6 - Personal Contacts:

This factor measures face-to-face contacts and telephone dialogue with persons not in the supervisory chain. The agency credited level 6-2. The appellant believes Level 6-3 is appropriate.

At Level 6-2, the highest level described in the standard, personal contacts are generally with all levels of employees, supervisors, union representatives, and administrative staffs in the organization served or in support facilities located in the same geographic area or in regional, district, or field offices.

Level 6-2 is met. The appellant’s contact are with employees in the agency and outside her immediate organization.

At Level 6-3, according to the Primary Standard, personal contacts are with individuals or groups outside the employing agency in a moderately unstructured setting. For example, the contacts are not established on a routine basis; the purpose and extent of each contact is different; and the role and authority of each party is identified and developed during the source of the contact. Typical of contacts at this level are attorneys, contractors, or representatives of professional organizations, the news media, or public groups.

Level 6-3 is not met. There is no evidence in the appeal record that the appellant routinely has contact with the types of individuals and groups described at this level. Her contacts are routinely with students, instructors, and facility personnel, and the role and authority of each party is clear, unlike contacts described at Level 6-3 of the Primary Standard.

Level 6-2 is credited for 25 points.

SUMMARY		
FACTOR	LEVEL	POINTS
1. Knowledge required by the position	1-3	350
2. Supervisory Controls	2-3	275
3. Guidelines	3-2	125
4. Complexity	4-2	75
5. Scope and Effect	5-2	75
6. Personal Contacts	6-2	25
7. Purpose of Contacts	7-2	50
8. Physical Demands	8-1	5
9. Work Environment	9-1	5
	Total	985

In accordance with the grade conversion table in the standard, a total of 985 points equates to GS-5, 855 to 1100 points.

Office Automation Grade Evaluation Guide

The office automation work is evaluated using the Office Automation Grade Evaluation Guide which is also written in the FES format. These duties do not impact the grade of the position, therefore, an abbreviated evaluation follows:

SUMMARY		
FACTOR	LEVEL	POINTS
1. Knowledge required by the position	1-3	350
2. Supervisory Controls	2-2	125
3. Guidelines	3-2	125
4. Complexity	4-2	75
5. Scope and Effect	5-1	25
6. Personal Contacts and 7. Purpose of Contacts	1a	30
8. Physical Demands	8-1	5
9. Work Environment	9-1	5
	Total	740

In accordance with the grade conversion table in the standard, a total of 740 points equates to a GS-4, 655 to 850.

Summary

The training technician duties equate to GS-5 and the office automation duties equate to GS-4. The technician duties are paramount and grade-controlling, therefore, the position is properly graded at GS-5.

Decision

The appellant's position is properly classified as Training Technician (Office Automation), GS-1702-5.