

# Position Classification Standard for Transportation Clerk and Assistant Series, GS-2102

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## SERIES DEFINITION

This series includes positions that involve supervising or performing work to arrange transportation for or perform other actions in connection with the movement of freight, passengers, or personal property by Government or commercial means. This series also includes other transportation support work not covered specifically by another one grade interval series in the Transportation Group (e.g., fleet management, safety or regulatory program support, quality control and inspection, carrier performance evaluation, or transportation report analysis and preparation). The work requires a practical knowledge of the regulations and methods governing traffic management or transportation programs.

This standard supersedes the series definition for the Transportation Clerk and Assistant Series, GS-2102. It also supersedes standards for the Travel Series, GS-2132, dated December 1960; the Passenger Rate Series, GS-2133, dated December 1960; and the Shipment Clerical and Assistance Series, GS-2134, dated September 1982. The GS-2132, GS-2133, and GS-2134 series are abolished. Positions classified to these series are to be reclassified to the GS-2102 series or other appropriate series.

## EXCLUSIONS

1. Classify to the [Freight Rate Series, GS-2131](#), positions that require technical knowledge and in-depth review and analysis of shipping regulations and publications governing routing, rate application, and classification of freight. The freight shipment duties described in the GS-2102 standard involve the use of rates and routes that are already prescribed in established agreements (standing route orders, container agreements, carrier lists, etc.). Freight shipment work requires a practical rather than in-depth technical knowledge of the structure and content of carriers' tenders or other agreements. This practical knowledge is used to check for information such as the locations serviced, rates charged, and stopoff provisions included in tenders or agreements. Some positions involve the performance of a combination of freight rate work and freight shipment work. Determine the classification for these positions by applying the principles for mixed series and mixed grade positions. For more information on the distinctions between freight rate work and freight shipment work, see the standard for the Freight Rate Series, GS-2131.
2. Classify to the [Voucher Examining Series, GS-0540](#), positions that involve examining vouchers, shipping documents, invoices, and related papers that request payment for transportation services when the purpose of the work is to determine the propriety of the expenditure of Federal funds but not the propriety of rates charged or services performed.
3. Classify to the [Transportation Loss and Damage Claims Examining Series, GS-2135](#), positions that involve examining, developing, reviewing, or authorizing claims related to loss or damage of freight while in the custody or control of carriers. Positions in the GS-2102 series involve work such as tracing or locating lost shipments by searching for control numbers, contacting personnel throughout shipping channels, and preparing or coordinating

receipt of reports of loss or damage. Work in the GS-2102 series does not involve responsibility for investigating causes of damage, developing the facts of the case, or determining liability. Work that involves those duties is classified to the GS-2135 or other appropriate series.

4. Classify to the [Traffic Management Series, GS-2130](#), positions that involve planning, developing, or executing traffic management policies and programs, when this requires analytical ability combined with substantive knowledge of traffic management concepts, principles, and techniques.
5. Classify to the [Mail and File Series, GS-0305](#), positions that require knowledge of filing methods and procedures to sort, index, and file tariffs, tariff supplements, tenders, agency regulations, and other transportation reference documents.
6. Classify positions to the appropriate series in the Federal Wage System when the primary requirement of the work involves the operation of equipment or machinery, or the performance of other trades and labor work. Some positions involve the performance of a combination of transportation support work and trades and labor work (e.g., operating forklifts, pallet and handtrucks, or other materials handling equipment). Determine the classification of these positions based on the paramount knowledge or experience requirements. For more information on how to make distinctions between positions covered by the General Schedule and Federal Wage System, see the [Introduction to the Position Classification Standards](#).
7. For other excluded work, see the following series:  
  
[Transportation Specialist Series, GS-2101](#);  
  
[Cargo Scheduling Series, GS-2144](#);  
  
[Transportation Operations Series, GS-2150](#); and  
  
[Marine Cargo Series, GS-2161](#).

## OCCUPATIONAL INFORMATION

### Organization of Transportation Support Work

The objective of most transportation support work is to obtain the most efficient transportation services at the least cost. Transportation support work is typically organized by specific functional areas. Functional specialties include, for example, freight, passenger, personal property, and fleet management.

*Freight* shipment work involves duties such as--

- securing carriers to arrange for pickup, delivery, and storage of shipments;
- identifying the mode or combination of modes, types of special equipment, and services required for shipments; and
- advising customers of inadequacies or inaccuracies in shipping requests and related documentation.

*Passenger* travel work involves duties such as--

- providing information on air, bus, and/or rail schedules and fares;
- ensuring tickets, rental car reservations, and itineraries issued by the contract travel service office correspond with travel authorized;
- planning itineraries and arranging for commercial, Government-owned, or contracted travel;
- ensuring the lowest contract fare is obtained or exceptions are authorized;
- determining, verifying, or explaining entitlements related to househunting trips, temporary quarters, administrative leave, transportation of dependents, reimbursement of expenses, car rentals, baggage allowances, stops enroute, emergency travel, etc.; and
- checking in passengers at Government air terminals to include reviewing travel documents, preparing boarding pass tickets, weighing and tagging baggage, completing cash transactions, and providing a variety of information to passengers related to flight arrivals and departures, fares, flight itineraries, border clearance requirements, seat availability, etc.

*Personal property* shipment work involves duties such as--

- determining and advising on entitlements or procedures related to, for example, temporary storage of goods, weight allowances, prohibited items, and shipment of unaccompanied baggage, privately owned vehicles, and household goods;
- preparing cost estimates to assist the customer in determining the best method of movement (e.g., Government, commuted rate, or "do-it-yourself");
- selecting carriers and arranging for the pickup, delivery, and storage of personal property; and
- establishing and maintaining records of all lots in storage, determining if lots exceed weight allowances, and arranging for the removal or relocation of items.

*Fleet management* involves the management of Government-owned or leased passenger cars, trucks, or special purpose vehicles. It includes duties such as--

- reviewing, recording, or compiling information related to vehicle assignment and use, income, mileage reports, preventive maintenance services, accidents, billing, or other program data;
- developing and maintaining accident case files;
- developing rental rates to cover operating costs;
- conducting or assisting in inspections or investigations of assigned vehicles; and
- ensuring optimum vehicle availability and use by rotating or reassigning vehicles between sections/units/centers.

Among other responsibilities, the following tasks are common to many transportation clerk and assistant functions:

- preparing and issuing paperwork to initiate, document, or complete transportation actions;
- responding to customer complaints or problems involving delays, loss, or damage;
- reconciling and certifying bills related to transportation actions;
- analyzing, reviewing, and preparing reports or correcting computerized error listings; and
- conducting performance reviews and quality inspections of services provided under contract.

The four specialty areas, i.e., freight, passenger, personal property, and fleet management, represent the predominant work performed by transportation clerks and assistants in the Federal Government. Some transportation clerks and assistants work in other functional specialty areas such as transportation safety and regulatory programs.

### Impact of Deregulation and Automation

Prior to the 1970's, the transportation industry was highly regulated. Deregulation increased competition among established carriers and added new carriers to the market. This resulted in a variety of rates, routes, and services being offered under varying conditions. To keep up with constantly changing rates, fares, and routes, increasing reliance was placed on automated technology. Automated data bases or software packages have been established to assist in keeping track of information such as airline fares, schedules, and carrier tenders, and to capture a variety of data that are used for tracking, reporting, routing, or booking shipment or passenger movements.

Transportation clerks and assistants who work in an automated environment must have sufficient knowledge of automated systems to apply instructions for transportation actions such as data entry, information or reports retrieval, error correction, and record searches. The work is performed through terminal stations and/or personal computers. Some employees also maintain specific files or records in support of transportation operations and are responsible for keeping them current. Other employees, because of their extensive experience in a transportation support function, assist in the automation of clerical processes by providing subject-matter input and review.

Using an automated transportation system, rather than a manual one, requires a different orientation to creating, acquiring, or processing information. In some cases, its use requires continual training due to constant changes in program capabilities. This, however, does not exclude a position from coverage by this series when the work involves a primary knowledge of transportation procedures, programs, and rules.

The use of automated transportation systems to do transportation support work is addressed in the factor levels in this standard. Use of an automated system, by itself, does not normally affect the grade of transportation support positions. Rather, the primary influences are typically the subject matter knowledge of the kinds of information available in the system and the way that information is used.

## TITLES

*Transportation Clerk* is the title for positions in grades GS-4 and below.

*Transportation Assistant* is the title for positions in grades GS-5 and above.

*Lead Transportation Clerk* and *Lead Transportation Assistant* are the titles for positions that meet the criteria in the [General Schedule Leader Grade Evaluation Guide](#).

*Supervisory Transportation Assistant* is the title for positions that meet the criteria in the [General Schedule Supervisory Guide](#).

Transportation support duties are varied and, in some cases, highly specialized. For ease of recruitment, promotion, reduction-in-force, or other purposes, agencies may add parenthetical titles, for example, (Freight), (Passenger), (Personal Property), or (Fleet Management), when further distinctions in the work are necessary. These parenthetical titles are suggestions only. Agencies may use other titles to reflect specializations, or they may use no specialized designations. Work that requires a fully qualified typist, data transcriber, or stenographer, or that requires knowledge of general office automation procedures and competitive level proficiency in typing must be titled using the appropriate parenthetical titles. (See titling instructions in the [Introduction to the Position Classification Standards](#).)

## EVALUATING POSITIONS

Evaluate nonsupervisory positions using the factor level descriptions and assigned point values in this standard. For those few positions that may warrant factor levels above or below the levels provided in this standard, refer to the [FES Primary Standard](#) and other related FES standards. For more information on how to apply FES standards, see information in [The Classifier's Handbook](#) and in the [Introduction to the Position Classification Standards](#).

Evaluate work leader positions using the [General Schedule Leader Grade Evaluation Guide](#) along with the criteria in this standard.

Evaluate supervisory positions using the appropriate [general schedule supervisory guide](#).

Since transportation clerks and assistants perform a variety of work, it is not practical to describe all work situations under the factor level descriptions. When evaluating positions, credit work that is not described specifically under a factor level description if it is equivalent to and fully meets the intent of that factor level. Users also may refer to other guides or standards for comparative purposes (e.g., [Grade Level Guide for Clerical and Assistance Work](#)) when evaluating work not covered directly by the criteria in this standard.

The illustrations in this standard relate to the four predominant specialty areas, i.e., freight, passenger, personal property, and fleet management. However, users may select any illustration under a factor level as a point of reference for evaluating any kind of transportation clerk or assistant work. For example, users may determine that a "passenger" illustration more closely resembles the freight shipment work being evaluated than any of the "freight" illustrations, or vice versa.

### GRADE CONVERSION TABLE

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

| GS Grade | Point Range |
|----------|-------------|
| 1        | 190-250     |
| 2        | 255-450     |
| 3        | 455-650     |
| 4        | 655-850     |
| 5        | 855-1100    |
| 6        | 1105-1350   |
| 7        | 1355-1600   |

## FACTOR LEVEL DESCRIPTIONS

### FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

#### *Level 1-2 -- 200 Points*

The work requires knowledge of basic and well-established transportation procedures related to routine and repetitive aspects of transportation support work. This work requires knowledge comparable to one or more of the examples listed below.

- Knowledge of basic information, terminology, forms, or reports that are part of a transportation program or operation to screen for missing information, prepare final copy of documents, maintain files, respond to routine questions, or perform similar duties.
- Knowledge of the workflow of the unit sufficient to distribute messages and work to appropriate personnel.
- Knowledge of one or a few simple automated or manual transportation files to locate, add, retrieve, or correct routine information using well-established, clear-cut procedures.
- Knowledge of arithmetic used in transportation operations and programs to perform simple calculations using basic formulas.

#### *Illustrations:*

- Employees check travel requests, domestic routing requests, export traffic releases, bills of lading, or other forms for the presence of various data or information. For example, they may check for the presence of signatures, accounting codes, availability and arrival dates, and shipper/passenger or consignee name and address. They make sure information required for data or log entry is present, or refer incomplete documents to the supervisor.
- Employees provide routine information on flight schedules, fares, rental car rates, and per diem allowances. They estimate passenger travel costs by direct reference to fare guides, per diem listings, and rental car rates.
- Employees sort various incoming documents, log pertinent data, assign control numbers, and route documents to appropriate units. They provide information about the status of actions or respond to other inquiries by referring to readily available information.
- Employees prepare final copy of forms (e.g., bills of lading) by filling in the appropriate information, such as carrier, route, destination, control number, accountable activity, appropriation to be charged, number of containers, and transportation accounting code, from clearly annotated transportation documents.



*Level 1-3 -- 350 Points*

The work requires knowledge of a body of standardized transportation regulations, procedures, and operations related to one or more transportation support functions. This work requires knowledge comparable to one or more of the examples listed below.

- Knowledge of established transportation or traffic management rules to perform a full range of transportation support duties. For example, in arranging for the movement of goods or passengers, this may include rules governing--
  - ! the selection of carriers under established agreements (e.g., carriers identified in standing route orders, under contract, on established lists, or in fare guides);
  - ! weight minimums/maximms and other restrictions for standard conveyances; or
  - ! preparation, review, or verification of movement and billing instructions related to such moves.

The range of duties may include selecting modes or carriers, consolidating shipments or coordinating connections, responding to customer inquiries, and ensuring regulatory compliance throughout the movement process, i.e., ensuring equal tonnage distribution, appropriate use of contract carriers, or proper markings or documentation.

- Knowledge of the structure and content of transportation documents (e.g., tenders, bills of lading, invoices, travel orders, or vehicle accident or usage reports) to investigate and resolve routine or recurring discrepancies, check documents for adequacy, or perform comparable actions that are covered by established procedures.
- Knowledge of one or more automated transportation data bases associated with a specific transportation function sufficient to input a range of standard information or adjustments, understand recurring error reports and take corrective action, and generate a variety of recurring reports.
- Knowledge of related functional areas to investigate and resolve recurring problems, coordinate actions, or expedite receipt of needed documentation using established approaches. For example, arranging for transportation of passengers to overseas locations may involve coordinating with personnel working in passport processing, billing, and ticketing functions to ensure timely receipt of the traveler's tickets, passports, and other paperwork and to obtain explanations for delays or errors in same.
- Knowledge of frequently used and clearly stated regulations to respond to a range of recurring questions from agency or activity personnel, customers, commercial carriers, or others.

*Illustrations:***FREIGHT**

- Employees move general freight using standing route orders or other approved rate agreements. They ensure that recommended tenders cover locations and services desired and make cost comparisons. Employees select the appropriate mode for small shipments, such as bus, air express, parcel post, or small package carrier considering requested due dates, size, weight, and commodity restrictions for each mode. They consolidate shipments having similar geographic routes and movement dates to meet minimum weight restrictions. They suggest changes in requested mode and explain restrictions on use of modes. They divert freight to quicker methods of transportation when immediate delivery becomes a priority.
- Employees expedite or locate lost or misplaced shipments by searching for identifiers, such as control numbers, shipment date, carrier code, destination, and truck, vessel, or flight number, in automated or manual files. They request confirmation or status of shipments from personnel in receiving, carrier, and port activities. They prepare reports or provide information on dates shipments were received, dates loaded/lifted, current location of shipments, and intended disposition. They notify appropriate personnel of changes in priority status and provide necessary clearance information.
- Employees reconcile, prepare, verify, or update a variety of reports or documents. For example, they review information on the number of containers loaded and lifted, number billed for, and services provided to determine if carriers' invoices are correct. They compare invoice information to manifests, bills of lading, transportation control and movement documents, or other source documents to detect incompatible or questionable elements. Employees access the appropriate files to make changes or correct errors in data.

**PASSENGER**

- Employees screen tickets, itineraries, and bills involving foreign and/or domestic travel to ensure that information pertaining to rental cars, dates, travel periods, connections, etc., is compatible with travel authorized and that the lowest contract fare(s) was selected. They consider reasons for selection of higher cost or noncontract carrier. For example, they consider factors such as urgent timeframes, space availability, and remoteness of origin or destination points to determine if requests should be approved or forwarded for further review. They coordinate travel plans involving a combination of domestic and foreign travel with the contract travel service office, passport office, or other offices. In doing so, they can ensure maximum use of Government-owned/contracted transportation or U.S. carriers and obtain or expedite the receipt of required documents, such as passports and visas. They provide information or answer recurring questions such as--
  - ! what kind of paperwork is required for foreign travel (e.g., passports, visas, medical or security clearances);
  - ! how much leadtime is needed to process the paperwork; and

- ! when is it appropriate to use actual subsistence rates, noncontract carriers, or privately owned vehicles.
- Employees screen travel documents involving relocation to determine or verify entitlement or authorization for family member travel, location, stops en route, car rental, baggage and escort services, etc. They notify applicants or others if additional information is needed.

### **PERSONAL PROPERTY**

- Employees screen property lists and shipment applications for prohibited items and property weight totals exceeding approved limits. They check applications against transfer orders to identify and reconcile discrepancies (e.g., pickup or delivery points on shipment applications that differ from those indicated on orders). They discuss discrepancies with applicants and transportation officers to ensure that the applicant is aware of any additional costs or liabilities that may result from the differences. They compute shipment costs of personal property to determine excess costs when shipments involve both authorized and unauthorized movements. They suggest changes to requested movement dates to correspond with schedules of low cost carrier(s). Employees select carriers for outbound shipments from approved lists. They consider each carrier's ability to meet pickup and delivery dates, carrier performance records, and agency requirements for distributing business on an equal tonnage basis.
- Employees monitor inbound shipments from both domestic and overseas locations. They set up or use tracking systems and initiate tracers when shipments are late. They contact carriers to get information on shipment location and intended disposition. They use established procedures to clear inbound shipments, estimate storage costs, select commercial storage warehouses from approved lists, establish and maintain records of all lots in storage, and verify the accuracy of storage charges.

### **FLEET MANAGEMENT**

- Employees perform a variety of duties in connection with the day-to-day management of assigned vehicles. For example, they make arrangements for vehicle use, verify incoming invoices for payment, and call vendors to discuss discrepancies. They prepare accident reports based on information received from the customer. From this information, employees provide advice to customers on the number of repair estimates needed and places to get estimates. Employees maintain records on Government-owned vehicles. They ensure that information pertaining to vehicle identification tags, field assignment or termination, and maintenance or repair records is accurate and current.

*Level 1-4 -- 550 Points*

The work requires knowledge and application of an extensive body of transportation regulations, methods, and practices to perform a wide variety of interrelated or nonstandard transportation support assignments and resolve a wide range of problems. The work requires knowledge comparable to one or more of the examples listed below.

- Knowledge of transportation regulations that relate to the movement of a wide range of specialized shipments. For example, this includes assignments regularly involving the movement of oversized, heavy haul, hazardous, and security risk items. Moves of this nature require extensive practical knowledge of the carrier industry, specialized shipment needs, and terminal or storage capabilities to identify the appropriate shipping method, carrier equipment, services, and special handling required.
- Knowledge of transportation regulations governing entitlements and documentation requirements for domestic or foreign relocation travel to advise on travel procedures, restrictions, and allowances, and to resolve conflicts or issues related to the travel. Conflicts or issues might involve repayment or crediting of travel funds advanced; disputes between carrier and customer; or emergency situations, such as those involving extremely short leadtimes, problems in transit, inadequate paperwork for foreign entry, or similar situations.
- Knowledge of a variety of transportation functional areas and their relationship to other functions to investigate complaints or errors that require, for example, reconstructing and reconciling incomplete information, conducting extensive and exhaustive searches for required information, or performing actions of similar complexity.
- Knowledge of automated transportation systems to reconcile errors that require an understanding of nonstandard transportation procedures, or to provide subject-matter assistance in the development of automated transportation procedures for clerical operations.
- Knowledge of extensive and diverse regulations governing a wide variety of types of passenger travel to make arrangements, provide advice, or perform other work that requires authoritative procedural knowledge of various different travel policies or laws. In some organizations, this might involve authoritative procedural knowledge of travel rules governing official, unofficial, military, civilian, foreign, domestic, and mobility deployment travel. In other organizations, this might involve authoritative procedural knowledge of rules governing travel sponsored by non-Federal monies, foreign travel of employees under special appointments (e.g., consultants, experts, visiting scientists), and unilateral and bilateral travel agreements with foreign countries in addition to standard kinds of civilian travel. In either case, the work typically involves knowledge of lead time needed to plan and arrange travel involving different kinds or combinations of modes of transportation, isolated origin/intermediate/destination points, multiple stops, foreign currencies, and special services (e.g., chartered buses, escorts).
- Knowledge of the requirements of various transportation regulations or operations to monitor and report on carrier compliance with contract terms, safety provisions, or other

transportation programs. This work typically involves knowledge of report preparation and skill in analyzing factual information to document deficiencies or areas of noncompliance and make recommendations for action.

*Illustrations:*

**FREIGHT**

- Employees review customer requests for various shipments of hazardous, temperature sensitive, fragile, oversized, heavy haul, urgent, or other freight not covered by standing route orders. They identify the need for special packing, loading, or handling, and coordinate arrangements for these needs with other activity personnel as well as with carriers. For example, employees review the nature, size, and weight of items to determine if open-top conveyance for loading by crane, temperature controlled equipment, special packaging or containerization, or security escort service is needed. They arrange for complete routings to handle shipments with urgent delivery dates, or shipments to isolated origin or destination points that cannot be transported through normal channels. They prepare complete en route instructions for material being shipped. For example, they provide information on shipment size, shape, weight, packing requirements, and compatibility for consolidation. They also indicate whether the material is knocked down or set up, skidded, palletized, nested, loose, packaged in barrels, boxes, or crates, and whether it is new or used.

**PASSENGER**

- Employees serve as relocation counselors for customers in specific geographic areas. They review travel orders and applicable regulations to determine entitlements and method of travel. They conduct individual or classroom sessions to advise on entitlements, such as allowances for househunting trips and temporary quarters, administrative leave, transportation of dependents, reimbursable expenses, relocation services, and paperwork necessary to document travel and substantiate claims for reimbursement or other purposes (e.g., relocation income tax allowance).

**PERSONAL PROPERTY**

- Employees determine and advise on entitlements or procedures, such as--
  - ! the type and quantity of personal property that can be moved at Government expense;
  - ! storage entitlements, movers' liabilities, and prohibited items;
  - ! the various methods of movement (e.g., Government, "do-it-yourself," or commuted rate); and
  - ! the paperwork necessary to document moves and substantiate claims for reimbursement of expenses or damage to goods.

- Employees arrange for the movement of special items, such as mobile homes, house trailers, campers, and large boats. They consider factors such as the age and condition of the item to determine the kind of special handling needed to transport property safely (e.g., blocking and bracing, pre-movement surveys, special carrier equipment). They serve as the contact point for resolving problems related to assigned moves (e.g., broken axles or structural flaws that surface in transit, or other conditions that require in transit action). Some employees review reimbursement claims resulting from these moves. This involves reviewing charges for handling services, temporary storage, third party services (e.g., utility connection), county and state mileage rates, and transportation advances.

## **FLEET MANAGEMENT**

- Employees assist fleet managers in evaluating the overall fleet management program. For example, employees collect data and review a variety of reports relating to vehicle use, expenses, and income to identify problems or trends for further review. They recommend the rental rates that should be used by each fleet management center to ensure recovery of costs. They assist fleet managers in auditing vehicle files, procurement actions, license tag and credit card registers, motor vehicle accident records, and the dispatch vehicle reservation system.

## **FACTOR 2, SUPERVISORY CONTROLS**

### *Level 2-2 -- 125 Points*

The supervisor or other designated authority provides standing instructions on recurring assignments by indicating what is to be done, applicable transportation policies and procedures to follow, quality and quantity of work expected, deadlines, and priority of assignments. For example, standing instructions may cover the steps involved in processing transportation documents. This guidance may provide information on how to:

- screen documents for missing or incompatible information;
- assemble and prepare the forms or other paperwork that make up the transportation file or record;
- use reports or other data to monitor the status of transportation actions;
- recognize and reconcile discrepancies; and/or
- use automated systems to access, retrieve, and generate various transportation data and reports.

The supervisor or others provide additional, specific guidance and reference sources on new or difficult assignments (e.g., those not covered by standing instructions).

Employees use initiative to perform recurring or individual assignments independently (e.g., investigate recurring discrepancies in transportation documents, obtain missing information from originators, or explain procedural requirements). Employees refer situations not covered by initial instructions or precedents to the supervisor or a senior employee for assistance.

The supervisor or others evaluate the accuracy and adequacy of both individual assignments and recurring work by reviewing the frequency and nature of problems resulting from data entry errors or problems with responding to inquiries or requests. The supervisor may also consider the nature and frequency of complaints, review production reports, or use controls built into the system.

Note: At level 2-2, some employees work more independently than others. This is because, over a period of time, they have developed knowledge of transportation program objectives, alternatives, local priorities, and operating policies and procedures that influence how transportation support work is done, and the kind of adaptations or exceptions that can be made. These employees carry out recurring assignments with less initial or in-progress supervisory consultation, although deviations from "standing instructions" still must be approved by the supervisor.

#### *Level 2-3 -- 275 Points*

The supervisor or other designated authority outlines objectives, priorities, and deadlines and provides guidance on dealing with unusually involved or one-of-a-kind situations.

Employees independently plan and carry out the successive steps to complete transportation support duties and use accepted practices to resolve problems and deviations. Problems and deviations include, for example, transportation actions that cannot be processed, monitored, or otherwise acted on using standing instructions. This may result because of the specialized nature of the problems, the existence of various conflicting documentation, the lack of documentation or information available, or other conditions. Examples include work that involves--

- shipping freight that is oversized, requires protective services, or is otherwise not covered by standing route orders, container agreements, standard packaging or packing procedures, etc.;
- providing a full range of counseling services and assistance to diverse audiences (e.g., advising customers before, during, and after movements);
- making route changes or departing from policy because standard routes are not feasible; or
- reconciling bills or verifying costs when the documentation is unclear or inaccurate and requires extensive research to determine propriety of the rates charged.

The supervisor or others review completed work for technical soundness, appropriateness, and conformity to policy and requirements. In some situations, work can be reviewed only after the fact in response to complaints from customers, carriers, or contractors. The methods the employee uses to complete the assignment usually are not reviewed in detail.

## **FACTOR 3, GUIDELINES**

### *Level 3-1 -- 25 Points*

Specific, detailed guidelines, such as desk procedures, checklists, computer manuals, address directories, code books, oral instructions, or samples cover all important details of the work. For example, the guides cover step-by-step procedures on how to sort, control, and distribute transportation documents; prepare basic transportation forms; and identify routine information missing from documents or requests.

Employees follow clear-cut guidance when, for example, sorting incoming transportation documents into appropriate categories, entering information into the computer, or controlling the flow of incoming or outgoing requests. The employee strictly follows guidelines and refers deviations to the supervisor or others for assistance or resolution.

### *Level 3-2 -- 125 Points*

Numerous procedures for doing the work have been established, and many specific guidelines are used. Guidelines include volumes of transportation regulations, manuals, guides, directories, tenders, or operating procedures. For example, guides may cover the kinds of paperwork required, special instructions or markings to use, kinds of carrier equipment available, clearance requirements, conditions for authorizing various entitlements, or carrier selection criteria.

Because of the number and similarity of guidelines or the diverse circumstances of individual actions, employees must use judgment to identify and select the appropriate reference and procedure for each phase of the process, question, or condition that develops. For example, employees select the appropriate shipping instructions and methods for small, large, general, or specialized shipments; or determine which passenger or personal property entitlement allowances apply under varying circumstances. In most cases, employees must be familiar with the general content of numerous guides since it is not practical to be researching guides continually to locate a specific reference. There may be omissions in guidelines that require employees to use some judgment and initiative to handle aspects of the work not covered completely (e.g., when deciding whether to delay shipments for consolidation purposes, devising clerical instructions to cover procedural gaps, or selecting a better route than the one requested by the customer). Employees refer situations requiring significant judgment or interpretation to the supervisor or others for guidance or resolution.



*Level 3-3 -- 275 Points*

Guidelines are similar to those described in Level 3-2, but are not applicable completely to many aspects of the work because of the problem solving or complicated nature of the assignments. For example, there may be no directly related precedent cases or reference sources to use in deciding if justifications for a higher than normal level of service are valid.

Employees use judgment to interpret guidelines, adapt procedures, decide approaches, and resolve specific problems. This includes, for example, evaluating customer justifications for premium service or reconciling incomplete and conflicting information when precedents or guidelines are not available or are not related directly.

**FACTOR 4, COMPLEXITY***Level 4-2 -- 75 Points*

The work involves performing related processing and procedural tasks in support of transportation related functions. For example, processing a transportation action may involve sorting incoming forms or requests, reviewing documents for gaps in information, assembling the appropriate document control forms, entering data into automated or manual files, verifying calculations, and distributing documents to the appropriate personnel.

Employees make decisions, such as how to sort incoming documents, locate and assemble information, and correct errors. They do this by reviewing similar cases or standard operating procedures and selecting from among clearly recognizable alternatives.

Employees take action using established instructions, practices, or precedents for format, content, and processing of transportation documents and requests. Actions taken are similar and well-established, although the specific pattern of actions taken may differ somewhat; i.e., the order and kinds of personnel contacted, the reference sources checked, and the entries or corrections made may differ depending on the given situation and the information available.

*Level 4-3 -- 150 Points*

The work involves performing one or more transportation support functions that require the use of different and unrelated procedures and methods. The use of different procedures may result, for example, because--

- assignments received are relatively broad and varied (e.g., involve a full range of shipping or traveler situations);
- work methods are not completely standardized (e.g., frequent changes occur or treatment of individual actions varies according to the nature of the questions or problems involved); or

- transactions are interrelated with other systems and often require extensive coordination with various, different personnel.

Employees identify the nature of the request, problem, or issue, and determine the need for and obtain additional information through oral or written contacts and review of regulations and manuals. Employees may have to consider previous actions and understand how these actions differ from or are similar to the issue at hand before deciding on an approach. For example, movements may involve varying types of freight, personal property, or traveler situations; and varying origins, destinations, and degree of customer understanding. In these situations, employees must examine or obtain information to determine applicable regulations, appropriate mode or mode combination for each different situation, kind of documentation and instructions required for each particular move, and need for special services.

Employees make recommendations or take actions (e.g., select the optimal means of transportation, determine entitlements, or verify compliance) based on a case-by-case review of pertinent transportation regulations and documents. For example, employees may perform one or more of the following:

- review requests for transportation of general cargo to determine the most appropriate shipping methods (e.g., bus, air express, truck, van), paperwork (e.g., export releases or special instructions), and actions required (e.g., clearances or need to request routing instructions) based on consideration of the weight, configuration, priority, destination, and freight classification;
- review requests for various specialized cargo (e.g., temperature sensitive, hazardous, oversized) to determine appropriate shipping methods and coordinate with various personnel on needs for special packaging, handling, loading conveyances, and other equipment;
- make the final review of orders, vouchers, and receipts that involve a variety of differing traveler situations by checking authorizations, entitlements, allowances, and figures;
- counsel applicants changing duty stations regarding their entitlements to personal and dependent travel, the optimal combination of shipping and storage services, allowances for "do-it-yourself" moves, and different ways to avoid excess cost or misuse of Government funds when this involves diverse situations and the need to tailor advice to fit varying individual concerns;
- review reimbursement claims, such as those submitted for "do-it-yourself" moves of personal property, when this involves reviewing the specific details of each move to determine Government vs. traveler costs; or
- review and prepare various manual and automated products related to vehicle use, coordinate vehicle assignment or other actions (e.g., maintenance, safety inspections, repairs), monitor for misuse or negligence, and maintain current inventories of assigned vehicles.

## **FACTOR 5, SCOPE AND EFFECT**

### *Level 5-1 -- 25 Points*

The purpose of the work is to perform limited, repetitive, or closely related tasks such as sorting and distributing transportation documents, entering routine transportation information into a data base system, and/or verifying repetitive types of data.

Assignments facilitate the work of higher grade employees. For example, processing work may involve separating transportation documents into categories and distributing them accordingly, entering data into the computer to enable higher grade workers to access information directly from the system, preparing final copy of transportation documents, or double checking figures or data before distributing to higher grade workers. The work relieves higher grade employees of some of the more procedural aspects of their work.

### *Level 5-2 -- 75 Points*

The purpose of the work is to provide a full range of transportation services or to perform other transportation support work that is covered by well-defined and precise program procedures and regulations.

Work products, in the form of corrected errors, completed transportation documents and reports, records of discussions about status or delays, or other actions affect the accuracy and reliability of further processes or services. For example, correcting errors in reports or records enables others to base decisions on accurate information. Ensuring complete and accurate paperwork and instructions furthers the timely movement of freight, personal property, or passengers.

### *Level 5-3 -- 150 Points*

The purpose of the work is to apply conventional practices to treat a variety of problems in transportation transactions. Problems might result, for example, from requests to expedite urgently needed items, a carrier's inability to meet the needs of the traveler or shipper, unexpected problems in transit, or conflicting information in documents or reports. The employee treats these or similar problems by applying established procedures.

In some situations, the work results in recommendations, actions, or reports that affect the ability of serviced programs to conduct business adequately. For example, arranging for accurate and timely mass movement of equipment and personnel affects the ability of an agency or activity to conduct military exercises, training, or other activities adequately. In other work situations, the quality of the transportation advice and decisions may affect the operation of certain programs. For example, monitoring carriers for compliance with regulatory, safety, or service requirements and preparing recommendations related to same, affects the adequacy of investigations into non-compliance with agreements and contracts, or investigations of violations of safety or other regulatory provisions. In still other situations, the work may affect the physical well-being of persons, or it may affect substantial costs incurred by the agency or activity. For example,

arranging for the timely transport of emergency personnel, critical equipment, or urgently needed supplies affects the adequacy of patient care. Selecting the most effective, efficient, and lawful handling of items or personnel, and committing the agency or activity to these services ensures the most advantageous costs to agencies and employees.

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

Match the level of regular and recurring personal contacts with the corresponding purpose of the contacts. Credit the point value where the two levels intersect.

*Persons Contacted*

1. Contacts are with employees in the immediate organizational unit or in closely related support units.

AND/OR

Contacts are with employees outside the organization or with members of the general public in very highly structured situations. For example, contacts may be with carriers or customers who are requesting specific forms or information or checking on the status of shipped items, travel documents, or vehicle availability.

2. Contacts are with employees in the same agency but outside the immediate organization. For example, contacts may be with personnel who are shipping or transporting items, or travelers who are seeking advice or information. Contacts also may include transportation clerks at other installations, supply personnel onsite, or employees in other agencies who are providing, requesting, or coordinating actions and information.

AND/OR

Contacts are with members of the general public in a moderately structured setting. For example, contacts may be with representatives of airlines and contract travel agencies who are completing arrangements for travelers. Also, contacts may be with representatives of moving companies, freight hauling companies, or commercial storage warehouses who are confirming information related to the transport and storage of items.

*Purpose of Contacts*

- A. The purpose of the contacts is to obtain, clarify, or provide information related to transportation support assignments. For example, contacts may be to obtain missing information, advise on the status of actions, or verify transportation needs. Contacts may involve answering a simple question, such as whether a particular vehicle is available, a

specific shipment has arrived, or a Government plane has left. Contacts also may involve explaining more technically oriented subject matter, such as restrictions on use of modes, contract carriers, or vehicles.

B. The purpose of the contacts is to plan and coordinate actions to prevent or correct errors, delays, or other complications from occurring. Examples include--

- briefing various personnel on their transportation entitlements;
- tracing missing freight or personal property through various channels;
- advising on or discussing shipment requirements;
- ensuring the timely and accurate receipt of travel documentation; or
- performing similar actions.

|                                      |   | P U R P O S E |    |
|--------------------------------------|---|---------------|----|
|                                      |   | a             | b  |
| C<br>O<br>N<br>T<br>A<br>C<br>T<br>S | 1 | 30            | 60 |
|                                      | 2 | 45            | 75 |

### FACTOR 8, PHYSICAL DEMANDS

*Level 8-1 -- 5 Points*

The work may require some physical effort, such as standing, walking, bending, or sitting. There are no special physical demands.

*Level 8-2 -- 20 Points*

The work requires above average physical agility, such as regular and recurring periods of prolonged standing, bending, stretching, and lifting (e.g., work at passenger check-in centers or shipment document pickup counters).

### FACTOR 9, WORK ENVIRONMENT

*Level 9-1 -- 5 Points*

The employee works primarily in an office setting involving everyday risks or discomforts. Normal safety precautions are adequate.

*Level 9-2 -- 20 Points*

The employee works in areas with moderate risks or discomforts that require the use of special safety precautions. For example, employees who work in warehouses or on loading docks may have to exercise special care when working around moving parts, materials handling equipment, conveyors, or crates. In some situations, employees may be required to wear protective clothing or gear.