

## Sample Job Analysis Checklists

### ROUTINE CLERICAL RESPONSIBILITIES

<i>Activity</i>	<i>Frequency</i>			
	<u>D</u>	<u>W</u>	<u>M</u>	<u>O</u>
Types labels, letters, envelopes, and invoices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Determine layout and format, and type in finished format.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proofread and correct errors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set up an type financial and statistical reports.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take dictation and transcribe.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transcribe dictation from voice recordings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Record, type, and distribute meeting minutes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compose standard letters in response to routine correspondence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule appointments without prior clearance, schedule meetings and conferences, and make travel arrangements including reservations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare meeting and conference rooms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain, process, distribute, and update records, files, and documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain confidential records and files, and handle confidential correspondence and records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open, sort and distribute mail.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Answer telephones, screen and place calls, monitor and follow up on voice mail recordings, refer callers to appropriate parties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare, process, and verify invoices, bills, checks and receipts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain and report expense account activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Receive and welcome visitors, and refer to appropriate parties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain and update mailing lists.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enter data electronically and verify.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Process payroll records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Perform calculations, post and verify figures, trace and adjust errors.
- Maintain inventory of office supplies, requisition new supplies, and distribute supplies to authorized parties.
- Schedule and monitor equipment repairs and service contracts.
- Maintain locks and keys for storage cabinets and other facilities, and distribute to authorized parties.
- Orient and train new employees.
- Schedule work for coworkers as requested.
- Handle cash and negotiable instruments.
- Maintain cash box.
- Sign legal documents.
- Act as resource for others as to staff and locations.
- Maintain records of cash receipts and disbursements.
- Review job applicants/applications and conducts screening interviews.
- Collate and bind.
- Make copies.
- Date and stamp documents.
- Recommend improvements in operations and procedures.
- Modify operations and/or procedures.
- Maintain procedures and information manuals.
- Develop operating budget for approval.
- Research, tabulate, and summarize information of routine, periodic or special reports.
- Present findings in oral or written form.
- Record and verify entries or accounts, journals, logs, and general ledgers.
- Balance accounts and reconcile statements.

Indicate the equipment that is operated as a regular part of the responsibilities of the job:

- |                        |                     |                          |
|------------------------|---------------------|--------------------------|
| Calculator             | Camera              | Cash register/petty cash |
| Computer               | Dictation equipment | Facsimile machine        |
| Microfilm equipment    | Photocopier         | Postage machine          |
| Security equipment     | Sorter              | Switchboard              |
| Word processor         |                     |                          |
| Other equipment: _____ |                     |                          |
| Other Activities:      |                     |                          |

### **CHECKLIST OF ROUTINE MANAGERIAL/SUPERVISORY DUTIES**

Analyze, on a periodic basis, workload and personnel needs of an organizational unit.

Recommend changes in the staff level of the work unit.

Review documentation for new positions and positions that have been revised.

Obtain approval to modify positions.

Interview candidates for employment and make hiring decision or recommendations.

Orient new subordinates concerning policy and procedures, work rules, and performance expectation levels. Review position responsibilities.

Plan, delegate, communicate and control work assignments and special projects concerning subordinates.

Establish and maintain specific work goals and objectives or quantitative and qualitative work standards to be achieved by subordinates.

Train, develop, and motivate subordinates to improve current performance and to prepare for higher- level jobs.

Determine significant changes in responsibilities and major duties of subordinates by reviewing their job responsibilities on a regular basis.

Evaluate the performance of subordinates. Document and discuss present and past performance with each direct report. Keep supervisor informed of results.

Review salaries of subordinates and recommend changes according to policy and procedures.

Recommend personnel actions such as promotions, performance awards, demotions, etc., according to budget guidance and policy.

Advise superiors and subordinates of developments that impact job duties. Ensure proper communications.

Maintain discipline, recommend and administer corrective action according to policy and procedures.

Communicate and administer personnel programs in accordance with design and objectives.

Maintain proper documentation on all subordinates.

Other responsibilities:

Sample Preview