

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

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: