

Jurisdictional Class: Competitive  
Adopted: August 14, 1991  
Revised: July 9, 2010

**RECORDS INVENTORY/PLANNING CLERK**

**DISTINGUISHING FEATURES OF THE CLASS:** This is a clerical position involving responsibility for assisting in the implementation and maintenance of a records management program. Duties require examining, identifying and determining retention periods for a variety of records and documents. Work is performed under the direct supervision of the Records Management Officer or other administrative staff. The incumbent does related work as required.

**TYPICAL WORK ACTIVITIES:** (Illustrative only)

Inventory all records by department, using approved State Archives (SARA) form, including locating, identifying, and quantifying records;  
Determine records retention periods using approved SARA retention schedule;  
Disposal of obsolete records, following guidelines, and procedures set forth by SARA;  
Prepare a complete listing of all records generated by departments;  
Organize and index all records for easy access;  
Assist in the planning for proper storage;  
May attend workshops regarding implementation of a records management program;  
May operate a variety of office equipment (typewriter, computer, word processor, microfiche, copier, etc.).

**FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES & PERSONAL CHARACTERISTICS:**

Thorough knowledge of modern record keeping methods;  
Good knowledge of office terminology, procedures, and equipment including computers;  
Good organizational skills;  
Ability to understand and carry out moderately complex oral and written directions;  
Ability to establish and maintain good working relations with superiors and staff.

**MINIMUM QUALIFICATIONS:** Either:

- (a) Graduation from a regionally accredited or New York State registered college or university with an Associate's Degree in secretarial science, office management, business administration, or related field; or
- (b) Graduation from high school or possession of a high equivalency diploma and two (2) years of clerical experience; or
- (c) An equivalent combination of training and experience as defined by the limits of (a) and (b) above.

**NOTE:** Secretarial training beyond high school from a New York State recognized secretarial or business school may be substituted for experience on a year-for-year basis.