

Jurisdictional Class: Competitive
Adopted: August 14, 1991
Revised: April 20, 2017

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)

Manages and maintains 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;
Makes simple arithmetic computations and prepare reports in relation to records management;
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 and software (typewriter, computer, microfiche, copier, etc.);
May act as a receptionist or answer the telephone.

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;
Working knowledge of business arithmetic and English;
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.