



ESF program "Development of the system of qualifications"

# OCCUPATIONAL QUALIFICATION STANDARDS

## Clerical staff, level 4

**Occupational Standards are documents** that the work, and a set of skills, knowledge and attitudes or competency requirements for successful performance of the work.

**Clerical staff, level 4** forms the basis for the compilation of vocational secondary education and continuing education and for assessment of the competence upon awarding the occupational qualification. The occupational qualification is obtained when the awarding body has assessed the compliance of the competencies of the person and issued a certificate of occupational qualification.

The initial occupational qualification is obtained on completions of the nationally recognized curriculum meeting this occupational qualification standard. The indication of obtaining of initial occupational qualifications entered in the leaving certificate/annex to the diploma certifies that the person has received the training and has a readiness to commence operation on the relevant occupational qualification.

<b>Title of the occupational qualification</b>	<b>Estonian Qualifications Framework (EQF) level</b>
<i>Clerical staff, level 4</i>	<i>4</i>

## Part A DESCRIPTION OF WORK

<b>A.1 Description of Work</b>
<p>Clerical staff are engaged in ensuring the smooth functioning of the clerical work in the organization, servicing of internal and external customers and document work within their jurisdiction, providing technical support (including data entry, document reproduction, scanning).</p> <p>The more detailed tasks of the clerical staff depend on the specific organization and usually require good communication skills and a fast, flexible and accurate response. Typical clerical work is transmission of information, communication on the phone, preparation of documents, data entry, servicing of official meetings and much more.</p> <p>The knowledge, skills and attitudes of the clerical staff, affect the organization's reputation.</p>
<b>A.2 Work units</b>
<p><b>A.2.1 Ensuring the functioning of the office work:</b></p> <ol style="list-style-type: none"><li>1) Organization of the maintenance of the office premises;</li><li>2) Preparation of official appointments and meetings;</li><li>3) Subscriptions (including storage) of periodicals and organization of activation of the reading rights;</li><li>4) Office technology management.</li></ol> <p><b>A.2.2 Servicing of internal and external customers:</b></p> <ol style="list-style-type: none"><li>1) Mediating information;</li><li>2) Servicing of official appointments and meetings.</li></ol> <p><b>A.2.3 Work with documents:</b></p> <ol style="list-style-type: none"><li>1) The creation and drafting of documents;</li><li>2) Reception and registration of documents;</li><li>3) Retaining of documents;</li><li>4) Calligraphy.</li></ol>
<b>A.3 Working environment and the specificity of the work</b>
<p>In general, the working time of the clerical staff is fixed. The work pace can be both alternating and routine and contain various tasks. The clerical staff works indoors. The work may involve physical effort and forced positions, which can cause adverse health effects.</p>
<b>A.4 Work equipment</b>
<p>Office, presentation and communication equipment.</p>
<b>A.5 Personal characteristics necessary for the work: aptitude and personality traits</b>
<ol style="list-style-type: none"><li>1) Ability to cooperate;</li><li>2) Empathy;</li><li>3) Adaptability;</li><li>4) A sense of commitment and responsibility;</li><li>5) Systematics, correctness;</li><li>6) Poise;</li><li>7) Tolerance;</li><li>8) Reliability;</li><li>9) Good oral and written communication skills;</li><li>10) Stress tolerance.</li></ol>



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<b>A.6 Professional training</b>
One can learn to be a level 4 clerical person in an institution of vocational education or by completing continuing vocational education.
<b>A.7 The most common job titles</b>
Office Specialist, Office Clerk, Office worker, Data Entry Clerk, Bureau Specialist, Technical Secretary, General Secretary

## Part B COMPETENCY REQUIREMENTS

### B.1. Structure of the occupational qualification

When applying for this occupational qualification, certification of the mandatory competencies B.2.1- B.2.3 is required.

### B.2 Competencies

#### MANDATORY COMPETENCIES

<b>B.2.1 Ensuring the functioning of office work</b>	<b>ECT Level 4</b>
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> <li>1. Monitors compliance of the maintenance of the office premises with environmental, safety and health requirements;</li> <li>2. Takes care of the appearance of the office premises (cleanliness, decorative elements, flowers, publications, etc.), from the perspective of an established practice in the organization;</li> <li>3. Explains and coordinates the need for economic goods, office equipment and inventory, if necessary, orders the necessary goods and maintains records thereof in accordance with the orders;</li> <li>4. Proposes and agrees on venues of meetings and appointments in accordance with the orders and, if necessary, prepares the meeting room, the necessary technical equipment and other related services;</li> <li>5. Prepares materials for the meeting and ensures their availability according to the orders;</li> <li>6. Subscribes for periodicals and organizes accessibility (including the organization's publications) and retention in accordance with the requirements established by the organization;</li> <li>7. Prudently uses office equipment (copiers, scanners, printers, presentation equipment, fax machines, etc.), if necessary, assists co-workers and arranges for service of the office equipment.</li> </ol>	
<u>Knowledge:</u>	
<ol style="list-style-type: none"> <li>1) Area related regulations and guidelines, including those governing occupational safety and health;</li> <li>2) Principles of document layout, including orders.</li> </ol>	
<u>Assessment method(s):</u> test and practical work.	

<b>B.2.2 Servicing of internal and external customers</b>	<b>ECT Level 4</b>
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> <li>1. Answers telephone calls accurately and understandably, resolves issues within his or her competence, forwards calls or messages to the relevant employees;</li> <li>2. Updates the information on the website and/or intranet, transmits messages, newsletters, press releases, reminders etc., in accordance with the instructions, selecting the appropriate method of transmission;</li> <li>3. Enters, updates and, if necessary, provides the necessary information (the data, birthdays, phone numbers, etc., of co-operation partners and customers) in the body of information created for that purpose in accordance with the requirements established by the organization;</li> <li>4. Communicates accurately with internal and external customers and if necessary, mediates information guided by the Code of Ethics of secretarial work;</li> <li>5. Informs the participants of official appointments/meetings, makes reminders, services (receives, directs, treats, etc.), internal and external customers in accordance with the requirements established by the organization.</li> </ol>	

Knowledge:

- 1) Basics of communication (telephone work, information exchange);
- 2) Principles of customer service;
- 3) Computer typing (blind typing);
- 4) Design programs and writing instruments;
- 5) Calligraphy styles and techniques;
- 6) Code of Ethics of secretarial work;
- 7) Computer skills - Module 1 - Module 7 and Module 12 (see Annex 1);
- 8) Official language at level B2 (see Annex 2);
- 9) Two foreign languages (preferably English and Russian), one at level B2 and the other at level B1 (see Annex 2).

Assessment method(s): situational task, test and practical work.

**B.2.3 Work with documents**

**ECT Level 4**

Performance indicators:

1. Draws up documents linguistically and technically meeting the predetermined form and requirements on the basis of good administration practice;
2. Draws up the minutes of meetings according to the predetermined protocol form;
3. Make copies and extracts of the documents according to the procedure established by the organization;
4. As necessary, organizes document translation and language editing;
5. Creates document templates (letter templates, etc.) according to the requirements;
6. Assists colleagues on drawing up documents within his or her competence and, if necessary, drawing up documents prepared by others;
7. Registers (including entering metadata) and systematizes documents in accordance with the procedure established by the organization;
8. Directs the documents to the addressee according to the need of the execution task through different channels (document register, mail, e-mail, etc.);
9. Monitors the time of execution of the documents and, where appropriate, prepares reminders in accordance with the procedure established by the organization;
10. Retains documents in accordance with the procedure established by the organization, taking into account the stages of the life cycle of the document;
11. Is responsible for document collectors, document boxes and shredders being in good working order in accordance with the instructions;
12. Prepares the documents (files, series) for handing over to the archive of the organization in accordance with legislation, guidelines and procedures established by the organization;
13. For the search of documents, uses the overview on the composition of the archive and registers the rentable documents (files) according to the procedure established by the organization;
14. Writes by hand and on the computer, using a variety of calligraphy styles.

Knowledge:

- 1) Area related legislation and guidelines, including principles of creation and drawing up of documents;
- 2) Principles of documentation;
- 3) Principles of document management system (DMS.);
- 4) Principles of preparation of the records of the archive of the organization;
- 5) Document retention requirements.

Assessment method(s): test and practical work.



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## Part C

### GENERAL INFORMATION AND ANNEXES

<b>C.1 Information for preparation and approval of the occupational standard and on the awarding body and a reference to the location of the occupational standard in the classifications</b>	
1. The marking of the occupational standard in the occupational qualification register	14-02012014-01/6k
2. Occupational qualification standard prepared by:	Ille Einmann, <i>Human Asset Management OÜ</i> Janne Kerdo, <i>The Estonian Assistants Society, Tallinn School of Economics</i> Anu Moosel, <i>SA Innove</i> Sirje Orvet, <i>The Estonian Assistants Society, Tallinn University of Technology</i> Anne Suurpõld, <i>Rödl &amp; Partner</i> Einike Uri, <i>Tallinn City Property Department</i>
3. Occupational qualification standard approved by	Professional Council of Business Service and Other Business Activities
4. Professional Council Decision No.	15
5. Date of Professional Council Decision.	02.01.2014
6. Occupational standard valid until (date)	01.01.2019
7. Occupational standard version number (1-n)	6
8. Reference to the Classification of Occupations (ISCO 08)	41 Junior Officials and Computer Officials
9. Reference to the European Qualifications Framework (EQF)	4
<b>C.2 Occupational title in a foreign language</b>	
English: clerical staff	
Russian: служащий офиса, офисный работник	
<b>C.3 Annexes</b>	
Annex 1 Computer skills	
Annex 2 Language proficiency assessment scale	