



ESF program "Development of the system of qualifications"

OCCUPATIONAL STANDARDS

Secretary, Level 5

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

Uses of the professional standards

- 1) Compilation of curricula and training programs meeting the requirements of the labor market;
- 2) Assessment of people's competency, including self-assessment and assessment of conformity on awarding of a profession;
- 3) Description and presentation of the occupations;
- 4) Career planning and laying the foundations for lifelong learning;
- 5) Identification of training needs and planning of training;
- 6) Preparation of job descriptions and recruitment of employees;
- 7) Comparison of occupations and qualifications.

Title of the occupational qualification	Estonian Qualifications Framework (EQF) level
<i>Secretary, Level 5</i>	5



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

Part A DESCRIPTION OF WORK

A.1 Description of Work

The Secretary is engaged in the communication (information exchange), servicing internal and external customers, working with documents and supporting the management activities within their competency and fulfilling the organization's goals.

The work tasks of the secretary depend on the specific organization and assume customer friendliness, rapid and flexible action, ensuring the confidentiality of information, coping with different people and situations.

The knowledge, skills and attitudes of the secretary, affect the organization's reputation.

A.2 Work units

MANDATORY WORK UNITS

- A.2.1 Documentation
- A.2.2 Organization of records management
- A.2.3 Working with document management system(s) (DMS)
- A.2.4 Organization of archival work
- A.2.5 Internal communication
- A.2.6 Counseling on records management issues

OPTIONAL WORK UNITS

- A.2.7 Project management
- A.2.8 Graphic design and calligraphy
- A.2.9 Technical organization of personnel work
- A.2.10 Technical assistance of accounting
- A.2.11 Technical organization of sales and marketing
- A.2.12 Organization of work with the documents in need of preservation
- A.2.13 Travel arrangement

The list of work tasks related to work units is provided in Annex 1 "Work units and work tasks".

A.3 Working environment and the specificity of the work

In general, the work time of the secretary is fixed. The work pace can be both alternating and routine and contain various tasks. The secretary works indoors. The work may involve physical effort and a forced position, which can cause a variety of adverse health effects.

A.4 Work equipment

Office, presentation, and communication equipment.

A.5 Personal characteristics necessary for the work: aptitude and personality traits

- 1) Ability to cooperate;
- 2) Adaptability;
- 3) A sense of commitment and responsibility;
- 4) Systematic, correctness;
- 5) Poise;
- 6) Tolerance;
- 7) Reliability;
- 8) Good oral and written communication skills;



ESF program "Development of the system of qualifications"

9) Stress tolerance.

A.6 Professional training

When applying for the occupational qualification of secretary level 5 is required:

- a) Successful completion of the professional higher education meeting the requirements of the occupational standards or of Bachelor's studies; or
- b) Vocational continuing education and at least two years professional experience.

A.7 The most common job titles

Data Entry clerk, Administrative Assistant, Assistant, Document Management Specialist, Board Secretary, Registrar, Office Specialist, Sales Assistant, Junior adviser, Recording secretary, Secretary, Secretary-archivist, Executive Secretary, Secretary-Personnel Specialist, Secretary-Accountant assistance, Technical secretary, Word processor, Text editor



Europa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

Part B COMPETENCY REQUIREMENTS

B.1. Structure of the occupational qualification

The occupational standard of secretary, Level 5, describes 6 mandatory, 6 optional competencies and transversal competencies.

On the application for this occupational qualification certification of mandatory competencies, B.2.1- B.2.6 and transversal competency B.2.14 and the option to select and certify one to two additional competencies (the optional competencies B.2.7 - B.2.13) are required.

B.2 Competencies

MANDATORY COMPETENCIES

B.2.1 Documentation

ECT Level 5

Performance indicators

- 1) Prepares linguistically and technically documents (including those prepared by other people) according to the given requirements on the basis of good practice*, creates, and creates document templates (letter templates, etc.);
- 2) Directs the documents according to the need of the execution task through different channels (fax, mail, e-mail, etc.);
- 3) Makes copies and extracts of documents, prepares certificates and executes formal notations in accordance with the needs and competencies;
- 4) Participates in the collection, description and preservation of different types of documents (web site, media, photos, company graphics, memorabilia, souvenirs, sound recordings, etc.), based on the specific nature of the organization and on a well-established tradition;
- 5) Participates in the creation of information (including the formation of databases) management systems according to the needs of information seeking process and organizational needs.

Knowledge:

- 1) Principles of document layout;
- 2) Principles of documentation.

Assessment method(s):

Practical work.

B.2.2 Organization of records management

ECT Level 5

Performance indicators:

- 1) His or her work is guided by the principles of classification of documents and follows the list of the documents and, if necessary, makes proposals for improvements;
- 2) Coordinates the life cycle of documents in accordance with the procedure established by the organization;
- 3) Registers documents in accordance with the requirements;
- 4) Complies with the restrictions on access to documents in accordance with the legislation and the requirements established in the organization;
- 5) Monitors the time of execution of the documents and, where appropriate, prepares reminders;
- 6) On the organization of document management, follows the procedure of records management and if necessary, makes proposals for the modernization thereof.

Knowledge:

- 1) Legislation (laws and regulations) governing records and archive management;
- 2) Standards of the field.

Assessment method(s):

Test and/or practical work.



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

B.2.3 Working with document management system(s) (DMS)	ECT Level 5
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> 1) Is involved in introducing DMS according to the needs and the instructions; 2) Works with DMS according to the instructions; 3) Is involved in amending DMS work processes according to the needs and the instructions. 	
<u>Knowledge:</u>	
1) Principles of DMS.	
<u>Assessment method(s):</u>	
Test and/or practical work.	

B.2.4 Organization of archival work	ECT Level 5
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> 1) Prepares the documents (files, series) for handing over to the archive in accordance with the legislation, guidelines and procedures established by the organization; 2) Searches documents using the list of records; 3) Monitors the document retention requirements in accordance with the established procedures (humidity, temperature, lighting etc.); 4) Registers the rentable documents (files), issues copies of the documents and make extracts according to the procedure established by the organization; 5) Ensures the destruction of documents in accordance with the requirements; 6) Under the guidance of a representative of an archival authority organizes handing over of records to the archival authority. 	
<u>Knowledge:</u>	
<ol style="list-style-type: none"> 1) Handing over of documents to the archive; 2) Principles of preparing the list of records; 3) Document retention requirements; 4) Document destruction principles. 	
<u>Assessment method(s):</u>	
Test and/or practical work.	

B.2.5 Internal communication	ECT Level 5
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> 1) Draws up formally and grammatically correct written messages; 2) Communicates written messages by selecting the appropriate communication channels (including the organization of work of internal web information); 3) Participates in shaping the culture of the organization and, if necessary, in the organization of events, based on the opportunities and needs of the organization. 	
<u>Knowledge:</u>	
<ol style="list-style-type: none"> 1) Bases of the organizational culture; 2) Bases of public relations. 	
<u>Assessment method(s):</u>	
Practical work	

B.2.6 Counseling on records management issues	ECT Level 5
<u>Performance indicators:</u>	
<ol style="list-style-type: none"> 1) Participates according to the need in the survey of the document management training needs and in conducting training (including information days, DMS, etc.) as technical assistance in accordance with the orders; 2) Advises colleagues on the basis of legislation and of the procedure established in the organization; 	



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

3) Documentation, document management organization, use of DMS, organization of archival work, etc.)

Knowledge:

- 1)
- 2) Legislation (laws and regulations) governing records and archive management;
- 3) Standards of the field;
- 4) Procedures of document layout.

Assessment method(s):

Practical work

OPTIONAL COMPETENCIES

B.2.7 Project management

ECT Level 5

Performance indicators:

- 1) Identifies the objective of the specific project within his or her area of responsibility and competence, based on the organization's needs;
- 2) Plans the project plan, including a timetable, on the basis of the objective of the project and the needs of the organization;
- 3) If necessary, draws up a calculation and risk assessment, based on the volume and the purpose of the project;
- 4) Leads and if necessary, coordinates the project work, according to the volume and the purpose of the project;
- 5) Prepares a summary based on the purpose of the project.

Knowledge:

- 1) Basics of project management;
- 2) Basics of process management.

Assessment method(s):

Solving of a situation task.

B.2.8 Graphic design and calligraphy

ECT Level 5

Performance indicators:

- 1) Designs web pages with the help of simpler design programs according to the needs of the organization;
- 2) Writes by hand and on the computer, using a variety of calligraphy styles.

Knowledge:

- 1) Design programs and writing instruments;
- 2) Calligraphy styles and techniques.

Assessment method(s):

Practical work

B.2.9 Technical organization of personnel work

ECT Level 5



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

Performance indicators:

Personnel records and administration of work relations

- 1) Prepares documents for commencing, resuming and termination of employment relationships (the employee questionnaire, the employment contract and its annexes, identity card, work time schedule, etc.) in accordance with the forms and in accordance with the law;
- 2) Complies with the requirements of confidentiality of personal data;
- 3) Maintains personnel records properly;
- 4) Enters information in the personnel database (employee personal data, salary data, etc.) in accordance with the procedure established by the organization.

Workforce planning and analysis of work

- 1) Makes queries from the personnel database and makes summaries (number of employees, number of sick days, days of training, etc.), on the basis of the given orders;
- 2) Prepares job descriptions on the basis of a given methodology in accordance with the needs of the organization.

Recruitment and selection

- 1) Participates in the preparation of job offers in accordance with the needs of the organization;
- 2) If necessary, publishes job offers in the relevant channels according to the orders;
- 3) Participates in the selection of employees in the capacity of technical assistance in accordance with the orders (completes documentation, etc.);
- 4) Helps new employees to become adjusted in accordance with the adjustment program established in the organization.

Development and training of employees

- 1) Summarizes and documents the training needs based on the organization's needs and the orders;
- 2) Participates in the preparation of a training plan and budget according to the given instructions;
- 3) Provides technical organization and communication of the training in accordance with the needs of the organization;
- 4) Incorporates training feedback and makes summaries according to the given instructions.

Internal communication and management of intra-organizational relations

- 1) Draws up formally and grammatically correct written messages in accordance to the forms established in the organization and to the language requirements;
- 2) Communicates written messages by selecting the appropriate communication channels;
- 3) Contributes to shaping of the culture of the organization;
- 4) Participates in the organization of joint activities with other structural units in accordance with the needs of the organization.

Knowledge:

- 1) Foundations of personnel work;
- 2) Laws governing preparing and retention of documents;
- 3) Basics of public relations;
- 4) Personnel databases.

Assessment method(s):

Practical work

B.2.10 Technical assistance of accounting

ECT Level 5

Performance indicators:

- 1) Organizes and checks the accounting records in accordance with established guidelines;
- 2) Participates in the organization of document storage and archiving, in accordance with the established procedures;
- 3) Participates in conducting inventories and draws up inventory documents on paper and the computer by entering the data into the relevant programs, in accordance with the established procedures;
- 4) Prepares primary and summary documents of accounting in accordance with the established



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

procedures, by preparing documents in both paper and electronic environment;

- 5) Enters the data into the relevant programs, in accordance with the established procedures;
- 6) Is involved in preparation and checking of financial accounting registers and reports, in accordance with the established procedures;
- 7) If necessary, submits the prepared reports into the e-commercial register, eSTAT or other electronic systems, in accordance with the established procedures;
- 8) Takes into account the working hours and fees according to the given instructions and the salary management system.

Knowledge:

- 1) Accounting theory and basic concepts;
- 2) Legislation (laws and regulations) governing the field;
- 3) Accounting on the computer and accounting computer programs;
- 4) Working hours and wages calculation bases;
- 5) Bases of taxation;
- 6) The foundations of preparation of the basic financial statements.

Assessment methods:

Practical work

B.2.11 Technical organization of sales and marketing

ECT Level 5

Performance indicators:

- 1) Participates in the definition of client groups, taking into account the service, product and organizational needs;
- 2) If necessary, participates in the setting of prices for products/services based on the pricing principles;
- 3) Prepares a promotional message, based on the advertising channel and the target group, based on the guidelines;
- 4) Uses different advertising channels in accordance with the organization's need for advertising the products/services;
- 5) Plans sales, using the appropriate sales channels (e.g., relational networks, client meetings, etc.), introduces the sales object based on the client's and the organization's needs;
- 6) Uses a variety of ways of selling and plans additional sales.

Knowledge:

- 1) Bases of marketing;
- 2) Legislation of the field (Advertising Act);
- 3) Advertising principles (organization of advertising);
- 4) Principles of organization of commerce;
- 5) Bases of logistics;
- 6) Principles of pricing of products;
- 7) Market research methods.

Assessment methods:

Practical work

B.2.12 Organization of work with stored documents

**ECT Level
5**



Europa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

Performance indicators:

Delivery and acceptance of documents

- 1) Explains the need of the structural units of the organization for transfer of documents to the archive of the organization, taking into account the annual increment of documents and draws up a timetable for receipt thereof;
- 2) Plans transfer of records to a public archive, seeking to obtain money for acquisition of accessories and prepares transfer applications, taking into account the quantities and dimensions of the different format transferred documents to obtain the accessories necessary for storage;
- 3) Organizes and describes the records for transfer to the public archives, taking into account the appraisal decisions given by the public archives, and the transfer requirements provided in the of the archival regulations and explained in the instructions of the public archive;
- 4) Checks the quantities of the transferred files from the units on the basis of the transfer lists and the number of the files to be transferred to the public archive on the basis of the lists before the transfer;
- 5) Checks the organization of the files transferred from the units and the compliance with the description of the provisions of the records management rules of the organization;
- 6) Checks the compliance of the formats of digital records to be transferred to the public archive with the requirements set out in the archival rules and arranges for the elimination of deficiencies;
- 7) Documents reception of the files from the units with the instrument of reception, according to the organization's records management procedures, and notes the new location of the files in the records;
- 8) Organizes the signing of the instrument of delivery and receipt sent by the archive in accordance with the requirements.

Organization of the documents

Documents on paper:

- 1) Forms the documents into archival documents on the basis of the conservation value, if necessary, removes the metal fittings, systematizes the documents within the archival documents, numbers the pages, formalizes the authenticating letter and the cover of the archival document, in accordance with the requirements;
- 2) Uses the archival accessories in accordance with the value document, depending on the term of retention and archival value.

Digital documents:

- 3) Identifies the file formats used and stores archive valuable documents meant for long-term preservation in the archival formats in accordance with the archival rules.

Destruction of documents

- 1) Follows the retention periods set for a series in accordance with the list of organization's documents;
- 2) Upon the expiry of the retention period prepares the document of destruction and separates the files for destruction;
- 3) Documents the destruction operations in accordance with the requirements of the legislation.

The use and overview of documents

- 1) Arranges the use of the documents subject to retention;
- 2) Keeps record of the archive in accordance with the list of documents.

Knowledge:

- 1) Principles of records and archive management;
- 2) Delivery and receipt of documents;
- 3) Document destruction principles;
- 4) Archive organizing principles.

Assessment methods:

Practical work or test

B.2.13 Travel arrangements

ECT Level 5

Performance indicators:



Europa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

- 1) Performs official trip tasks (travel planning, making appointments, booking and buying of hotels and air tickets, visa applications, etc.) according to instructions and to the cultural contexts of the destination;
- 2) Completes and submits official trip reports according to the requirements established by the organization.

Knowledge:

- 1) The nature of tourism products (accommodation, insurance, transportation, visas, etc.);
- 2) Cultural differences.

Assessment methods:

Practical work

TRANSVERSAL COMPETENCIES

B.2.14. Transversal competencies of the occupational qualification of a secretary

ECT Level 5

Performance indicators:

- 1) Complies with the principles of customer service in communication with domestic and foreign customers, in view of the organization's value judgments both in direct communication as well as using a variety of communication tools (phone, skype, etc);
- 2) Provides technical and organizational assistance in the organization of professional meetings and negotiations (translation work, premises, coffee and tea, gifts, etc.);
- 3) Prepares formal invitations, thank-you letters, etc., on the basis of given instructions;
- 4) Orders gifts with the insignia of the organization;
- 5) Organizes official trips and postings according to orders;
- 6) Uses the computer on the level AO7-AO1 (including computer typing);
- 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;
- 8) Orders and issues the necessary office supplies in accordance with the procedures established by the organization;
- 9) In his or her work uses the official language correctly on level C1;
- 10) Uses two foreign languages (preferably English and Russian) at level B2;
- 11) Participates in the assurance of the welfare facilities necessary for the successful operation of the organization (occupational health and safety, including ergonomics, stress at work, first aid, environment conservation, etc.) in accordance with the established requirements;
- 12) Is guided in his or her work by the Code of Ethics of the secretarial work;
- 13) Constantly improves his or her horizons (including news of the day) and specialist knowledge.

Knowledge:

- 1) Basics of team work;
- 2) Communication techniques and basics of communication;
- 3) Basics of service culture;
- 4) Definition and nature of service;
- 5) The role of the servicer;
- 6) Protocol and etiquette;
- 7) Knowledge of the society (economics, culture, politics, law, etc.);
- 8) Basics of contract law;
- 9) Legal grounds of employment;
- 10) Basics of archival work;
- 11) Basics of economics;
- 12) Basics of psychology;
- 13) Cultural and political differences.

Assessment method(s):

Transversal competencies are assessed in an integrated way in the course of the assessment of other



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



SINIASUTUS
Kutsekoda

ESF program "Development of the system of qualifications"

competencies provided in the occupational standard.



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

Part C GENERAL INFORMATION AND ANNEXES

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	
1. The marking of the occupational standard in the occupational qualification register	14-07062012-05/5k
2. Occupational qualification standard prepared by:	Andres Hurt, PricewaterhouseCoopers Anne Ilp, Tallinn School of Economics Janne Kerdo, The Estonian Assistants Society Anu Moosel, SA Innove Irina Ojala, Elion Enterprises Ltd. Sirje Orvet, The Estonian Assistants Society
3. Occupational qualification standard approved by	Professional Council of Business Service and Other Business Activities
4. Professional Council Decision No.	10
5. Date of Professional Council Decision.	07.06.2012
6. Occupational standard valid until	06.06.2017
7. Occupational standard version number (1-n)	5
8. Reference to the Classification of Occupations (ISCO 08)	According to Classification of Occupations 1, Secretary belongs to the 3th main group "Officials", code 41.
9. Reference to the European Qualifications Framework (EQF)	5
C.2 Occupational title in a foreign language	
English: secretary	
Russian: секретарь	
Finnish: sihteer	
C.3 Annexes	
Annex 1 Work units and work tasks	
Annex 2 Computer skills	
Annex 3 Language proficiency assessment scale	



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

Work units and work tasks

Annex 1

Work units and work tasks	Secretary, Level 5	Assistant, Level 6
1. Documentation		
1.1 Creation of documents	x	x
1.2 Transmission of a document, giving and performing of document-related tasks	x	x
1.3 Making copies and extracts of documents, formal confirmation	x	x
1.4 Inclusion of different types of documents	x	x
1.5 Management, systematization and storage of information	x	x
2. Organization of document management		
2.1 Creation of records management procedures	x	x
2.2 Preparation/amendment of the list of documents	x	x
2.3 Determination of the management of the life cycle of documents	x	x
2.4 The inclusion and registration of documents	x	x
2.5 Determination of the restrictions on access to documents	x	x
2.6 Checking of timely execution of documents	x	x
3. Working with document management system(s) (DMS)		
3.1 Implementation of the DHS	x	x
3.2 Changing the document management processes	x	x
4. Organization of archival work		
4.1 Preparation of the archive for organization	x	x
4.2 Description of documents	x	x
4.3 Retention of documents	x	x
4.4 Use of documents	x	x
4.4 Organization of monitoring of the retention period and the destruction	x	x
4.5 Organization of transfer of documents to the archival agency	x	x
5. Internal Communication		
5.1 Preparation and transmission of messages	x	x
5.2 Participation in the shaping of organizational culture	x	x
6. Counseling on records management issues		
6.1 Coordination of trainings	x	x
6.2 Counseling on records management issues	x	x
OPTIONAL COMPETENCIES		
7. Project management		
7.1 Determination of the need for the project	x	x
7.2 Coordination of implementation of the project	x	x
8. Graphic design and calligraphy		



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



ESF program "Development of the system of qualifications"

8.1 Website design	X	X
8.2 Calligraphy	X	X
9. Technical organization of personnel work		
9.1. Personnel records and administration of work relations		
9.1.1 Management and retention of personnel records	X	X
9.1.2 Management of personnel databases	X	X
9.2 Workforce planning and analysis of work		
9.2.1 Collection, processing and analysis of the workforce of the organization	X	X
9.2.2 Preparation of job descriptions	X	X
9.3 Recruitment and selection		
9.3.1 Preparation and dissemination of job offers	X	X
9.3.2 Participation in the selection process	X	X
9.3.3 Arranging of adaptation of employees	X	X
9.4 Development and training of employees		
9.4.1 Identification of development and training needs	X	X
9.4.2 Preparation of the training plan and training budget	X	X
9.4.3 Ordering and arranging of trainings	X	X
9.4.4 Evaluation of the effectiveness of trainings	X	X
9.5 Internal communication and management of intra-organizational relations		
9.5.1 Preparation and transmission of written messages	X	X
9.5.2 Participation in shaping of organizational culture	X	X
10. Technical assistance of accounting		
10.1 Management of accounting documents	X	X
10.2 Technical organization of inventory	X	X
10.3 Financial accounting	X	X
10.4 Calculation of remuneration	X	X
11. Technical organization of sales and marketing		
11.1 Organization of E-commerce and retail trade	X	X
11.2 Organization of advertising	X	X
11.3 Carrying out the sales process	X	X
12. Organization of work with the documents in need of preservation		
12.1 Delivery and acceptance of documents		
12.1.1 Planning of collection of documents	X	X
12.1.2 Preparing for the transfer of records	X	X
12.1.3 Checking of the documents to be transferred	X	X
12.1.4 Documentation of delivery and receipt of documents	X	X
12.2 Organization of the documents		
12.2.1 The physical organization (different types and genres of documents)	X	X



Euroopa Liit
Euroopa Sotsiaalfond



Eesti tuleviku heaks



SIHITASUTUS
Kutsekoda

ESF program "Development of the system of qualifications"

12.3 Destruction of documents		
12.3.1 Destruction of documents	X	X
12.4 Use of documents and having an overview thereof		
12.4.1 Use of documents	X	X
12.4.2 Having an overview of the archive	X	X
13. Travel arrangement		
13.1 Planning	X	X
13.2 Submission of reports	X	X
Transversal competencies	X	X