

Principal Clerk (1201)
Task List 2021

1. Obtains, assembles, prepares, and plans work for a staff of 3-35 clerks, administrative clerks, senior administrative clerks, office trainees, messenger clerks, accounting clerks, senior clerks, library assistants, or other positions as designated by the department.
2. Directs, explains, coordinates, assigns, and prioritizes work for a staff of 3-35 clerks, administrative clerks, senior administrative clerks, office trainees, messenger clerks, accounting clerks, senior clerks, library assistants, or other positions as designated by the department.
3. Reviews completed work for format and accuracy of information or typing.
4. Corrects English usage on completed work of subordinates.
5. Determines or assists in determining work methods and work standards for the unit, division, or department.
6. Develops and updates desk procedures and unit personnel policies.
7. Develops and updates or makes recommendations for changes in divisional or departmental policies, procedures, or manuals.
8. Composes letters, legal documents, or memos to other departments, other government agencies, City employees, and the public in response to inquiries or complaints, or supervises clerical employees who compose such correspondence.
9. Compiles statistical reports on the request of a supervisor or supervises employees who compile such reports.
10. Composes narrative reports for supervisors, other departments or other divisions within the department or supervises employees who compose such reports.
11. Personally reviews clerical position duties within the unit or supervises the review of such duties.
12. Supervises or personally prepares written position description statements.

13. Supervises or personally investigates, documents, and prepares reports concerning personnel matters such as discipline, commendations, and requests for training, deployment, and additional personnel.
14. Arranges work schedules, vacations, time off, and overtime for clerical employees within the unit.
15. Counsels and assists employees regarding their work performance and promotional ability.
16. Personally prepares employee evaluations or reviews and approves employee evaluations prepared by subordinate employees within the unit.
17. Makes verbal and written recommendations to supervisors regarding budgeting of equipment or personnel.
18. Prepares formal written budget requests for equipment for the unit.
19. Assists a computer programmer in the development and implementation of data processing methods for reports and payrolls.
20. Sorts departmental paychecks by division or bureau and distributes batched checks.
21. Follows up on assignments made by a supervisor to subordinate clerical employees within the unit and reports back to the supervisor on progress made.
22. Performs certification interviews and makes selection decisions for clerical positions within the unit.
23. Briefly pre-screens or supervises pre-screening of candidates for other units to interview.
24. Substitutes for supervisors in their absence.
25. Personally answers the most difficult complaints or questions received by mail, email, in person, or over the telephone, from City employees, the public, other governments agencies and other City departments, or routes them to the proper individual.
26. Uses knowledge of past practices to estimate future need for documents and make recommendations on the retention or disposal of records or documents.

27. Uses knowledge of past practices and available storage space to establish a divisional schedule for sending documents or records to the records retention center.
28. Personally performs or supervises the procedural or safety training of employees on an individual basis (new procedures, new employees, or handicapped employees) and/or volunteers on a group basis.
29. Supervises or personally performs the maintenance and control of inventory of office supplies or office equipment for the unit, bureau, or department.
30. Supervises or personally performs the maintenance and destruction of correspondence, records, documents, and microfiche for the unit, bureau, or departments.
31. Supervises (first and second level) employees who do typing for the unit, division, or department.
32. Supervises (first or second level) employees who provide mail service, including interdepartmental mail or the processing of large volumes of mail incoming or outgoing via the U.S Postal System.
33. Supervises (first or second level) employees who operate various reproduction equipment (photocopy, "ditto", "hector", offset, etc).
34. Supervises or initiates filing or cross reference systems within the unit.
35. Supervises the indexing, filing, routing, and control of records, documents, correspondence, and other material by performing periodic spot checks of materials filed or to be filed or by reviewing materials prior to filing.
36. Personally performs or supervises the answering or questions of City employees and the public counter (in English or Spanish) regarding departmental procedures, policies or rules, or general inquiries.
37. Personally performs or supervises (first or second level) the coding of documents for data processing input for the unit or department, and assists in the correction of rejections when necessary.

38. Supervises or personally proofreads and checks for accuracy and clarity, purchase orders, encumbrances, invoices, travel authorities, and Authorities for Expenditure, and ensures documents are processed in a timely manner.
39. Supervises (first or second level) or personally performs the research of files and records, including microfiche, journals, medical records, accounting records, etc. in response to inquiries, in preparation for writing reports, or to correct document errors.
40. Supervises employees who confer or personally confers with the Personnel Department, City Administrative Officer, City Attorney, Controller, Data Services Bureau, Mayor's Office, City Council, City Clerk, and employees of other departments on departmental or personnel matters.
41. Supervises employees who confer or personally confers with lawyers, doctors, engineers, or architects regarding departmental or personnel matters.
42. Supervises or personally prepares agendas for board meetings, committee meetings, or Equal Employment Opportunity meetings by gathering information from individuals involved.
43. Notifies participants (including employees of the City, private business, and other government agencies) of dates, locations, and pertinent matters to be covered in board or committee meetings.
44. Supervises (first or second level) an employee who serves, or personally serves as a receptionist or personal secretary to a board, or the head of a department, division, bureau, or other major office.
45. Supervises an employee who serves, or personally serves as a secretary to a group of administrators by taking minutes of group meetings.
46. Supervises (first or second level) or personally performs timekeeping for the unit.
47. Supervises (first or second level) or personally performs exception position timekeeping and payroll for the entire department.
48. Assists, supervises an employee who assists, or personally performs sub-professional accounting activities such as: purchasing, preparation of expense statements and travel authorities, cash receipts, remittance reports, deposit certificates, desk audits and/or departmental accounts receivable and payable.

49. Arranges or coordinates the repair of facilities owned or leased by the City.
50. Arranges or coordinates the repair or maintenance of equipment or property owned or leased by the City by requesting and authorizing repairs and maintaining records of repairs and maintenance prepared.
51. Administers or supervises petty cash funds for the department or unit and authorizes payments from that fund.
52. Accepts or supervises personnel who accepts unmarked deliveries other than mail, identifies the material and its destination within the department, and routes accordingly.
53. Supervises (first or second level) cashiers who accept payment for permits (cash or checks) and is responsible for the control of the money and receipts.
54. Personally certifies that payrolls and contracts are accurate and meet all requirements.
55. Designs or recommends the physical layout of the unit.
56. Personally performs or supervises an employee who acts as Custodian of Records and testifies in court cases.
57. Revises or designs forms for use by the unit or department.
58. Personally performs or supervises employees who purchase items using the departments' procurement card and ensures compliance with the departments' procurement manual and City's policies and procedures.
59. Manages and coordinates requests for special events.
60. Ensures subordinate employees comply with all mandatory training.