

Proposed Definition
Temporary Personnel-Office
List of Preferred Source Offerings Section D Approved Services
September 20, 2017

Temporary Personnel-Office (“Office Temps”) are workers hired for a pre-determined period to provide program support and assistance in a **defined** office environment. Office Temps assist with a wide range of administrative, and clerical, and miscellaneous functions and may range in skill from entry level to highly experienced personnel.

Notice to Purchasing entities:

1. The following job descriptions and service categories are intended to provide guidance to purchasing entities. Because job titles vary by purchasing entity, the service categories that follow identify approved Preferred Source Office Temp service offerings.
2. The Office Temp service categories and job descriptions contain a set of tasks and general expectations which have been grouped together and categorized under service category headings. Purchasing entities must define their scope of work, staffing needs and the level of skill required to meet their form function and utility requirements.
3. **Any job title identified by a purchasing entity must have an accompanying job description that aligns with the approved temp service categories under this definition.**

The definition of Temporary Personnel Office is a framework under which Preferred Sources are approved to offer support functions in an office environment. Experienced Office Temps may be required to supervise others.

4. This definition does not include the following:
 - a) Positions requiring policy decision making, financial advising, counseling, or program management.
 - b) Any positions that require a four-year or higher degree, or a certification or license including but not limited to: services as an accountant, actuary, architect, attorney, physician, engineer, nurse, laboratory technician, paralegal, social worker, etc.
 - c) Any positions requiring Information Technology (“IT”) hardware, software or system analysis, design development, programming, implementation, support, troubleshooting, repair, end user (break-fix) technical support, account administration, IT Helpdesk, etc.
 - d) Positions requiring manual labor services such as janitorial, maintenance, custodial, grounds, laundry, housekeeping, general labor, moving, warehouse, or construction trades etc.

At a minimum Office Temps under all Service Categories should be able to utilize office equipment to enter and retrieve data, this includes but is not limited to ability to use desktop or laptop computers, computer terminals, copiers, fax machines, desktop scanners or multifunction devices to fax, scan, photo copy, etc. Office Temps should be able to communicate at a level and in the number of languages which meet the purchasing entity’s form, function, and utility requirement. Office Temps may also be required to triage basic office computer and printer related issues, which require basic level knowledge of the operation of such equipment sufficient to engage appropriate IT resources for troubleshooting.

Temporary Personnel - Office Service Categories

Clerical Support Services (Calculations, File, Fiscal, Legal, Medical)

Perform a wide variety of clerical support duties, including but not limited to: typing, filing, copying, correspondence, invoices, receipts, and other records in alphabetical or numerical order per the filing system used by purchasing entity. Locate, retrieve, and file hard copy documents and open, edit, and save electronic files to various locations. Prepare incoming and outgoing mail for distribution. Duties may include; completing and filing records and forms. Provide basic bookkeeping, accounting, auditing, and billing support by coding, calculating, posting, or updating financial, payroll, accounts payable, accounts receivable, or budget type records, work with numerical data to keep records complete, and file records and forms. Some knowledge of financial terminology, payroll procedures, and budget preparation may be required. Ability to compute, classify, and record numerical data to keep financial records complete. May also check the accuracy of figures, calculations, and postings pertaining to business transactions recorded by other workers.

Data Entry and Word Processing Services

Operate standard office equipment with alphabetic or numeric keyboard; enter, verify, update, correct and retrieve information; enter information with speed and accuracy. Use office equipment (desktop, laptop, typewriter, etc.) to prepare letters, reports, forms, or other material from rough draft, corrected copy, or voice recording. Review and correct drafts for compliance with originals. Edit documents using proper grammar, punctuation, and spelling. Send and receive e-mail. Duties may include verifying data and preparing materials as specified by purchasing entity. Clerical support services may be incorporated into this service category. Follow and understand instructions for the development of final documents on word processing/computer equipment. Proofread and correct documents. Must have knowledge of business English, spelling, grammar, punctuation, math, knowledge of purchasing entity's software packages, and ability to learn within a reasonable time. May develop graphs, spreadsheets, charts, etc.

Administrative, Secretarial and Telephone Services

Provide support services that are essential to the operation of an office. Duties include scheduling, answering phones, typing, word processing, taking dictation, organization, and similar activities that support program areas as well as use of proper grammar, punctuation, and spelling when sending and responding to e-mail, drafting correspondence, scheduling appointments, proofreading or correcting documents, organizing and maintaining files, conducting research, sharing information, receiving or escorting visitors to meetings, or arranging conference calls. May also be required to operate multi-line telephone systems or switchboards to relay incoming, outgoing, or interoffice calls. May respond to inquiries or obtain information for the public, customers, visitors, and other interested parties. Call center, customer services, and telephone operators may provide scripted instructions to address customer concerns and forwarding the request to technical support if outside the scope of predetermined responses.

Human Resource Support Services

Provide HR teams and departments with support services including, but not limited to: employee benefits, payroll, on-boarding, human services, and salary information. Provide program support in the hiring process, including but not limited to: responding to application submissions, or screening applications and resumes. Send and receive e-mail, review and process employee leave, attendance, and time sheets.

Executive, Legal and Medical Secretarial Services

Provide a high-level of administrative support services that are essential to the operation of an office, including but not limited to: preparing executive correspondence or confidential reports. May organize business office

operations, answer and route calls, create and respond to correspondence, and send and receive e-mail. Use proper grammar, punctuation, and spelling in business communications. Interface with customers, the public or executives, perform special assignments, studies, and routine administrative or secretarial functions. May be required to use and understand legal terminology, procedures, and document formats to prepare legal documents such as summonses, complaints, motions, and subpoenas. May also assist with legal research. May be required to use and understand medical terminology, or hospital, clinic, or laboratory practices or the ability to take and transcribe complex medical dictation. Duties include scheduling appointments, medical coding, and billing, compiling, and recording confidential medical data, generating medical reports, and correspondence. Assist with calendars, travel arrangements, reimbursement, scheduling meetings/rooms/office equipment/conference calls/events, etc. Track and maintain office supplies and equipment.