

DACUM Research Chart for Management Assistant

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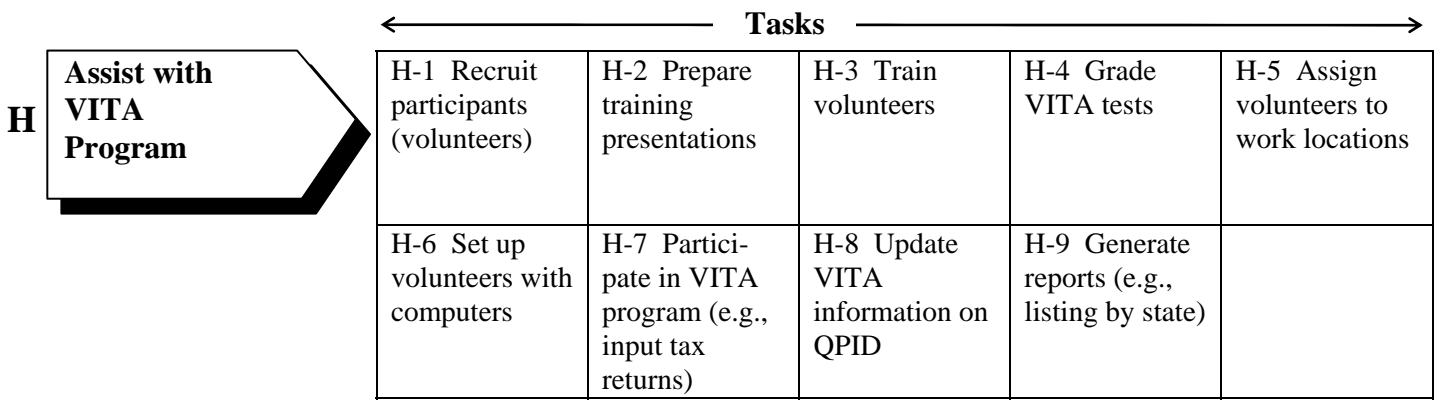
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Duties		← Tasks →				
A	Perform Administrative Tasks	A-1 Respond to voice mail	A-2 Respond to telephone calls	A-3 Respond to email messages	A-4 Set up email personal distribution lists	A-5 Set up voice mail group codes
		A-9 Serve as key operator for copier/fax	A-10 Transmit faxes	A-11 Distribute faxes received	A-12 Request assistance from help desk (e.g., SETR, IT, RTS, TRAS)	
B	Perform Timekeeping Tasks	B-1 Prepare overtime/compensation requests (Form 2787)	B-2 Obtain approval signatures (Form 2787)	B-3 Collect 4913 & 3081 timesheets	B-4 Review 4913 & 3081 timesheets for accuracy & completeness	B-5 Compare 4913 & 3081 timesheets for consistency
		B-10 Obtain manager's signatures for SETR every second week	B-11 Print 3081 reports (e.g., employee summaries)	B-12 Prepare 3081 timesheet amendments	B-13 File original 3081 & 4913 timesheets	
C	Prepare Correspondence & Reports	C-1 Gather data for report	C-2 Analyze report data	C-3 Prepare correspondence/report for signature	C-4 Proof report/correspondence	C-5 Edit report/correspondence
D	Order Computer & Office Supplies	D-1 Obtain equipment & office supply needs from employees	D-2 Identify competitive prices	D-3 Generate order form	D-4 Obtain management approval (e.g., RTS, order supply form)	D-5 Input order into RTS system (e.g., computer, supplies)
E	Arrange Meetings	E-1 Set date & time of meeting/conference call	E-2 Reserve meeting room	E-3 Set up conference call(s)	E-4 Invite NTEU/participants by email	E-5 Solicit agenda topics from participants & chairperson
		E-13 Clean up after meeting	E-14 Transcribe meeting minutes	E-15 Distribute meeting minutes		
F	Coordinate Travel Arrangements	F-1 Complete travel card applications	F-2 Obtain travel information (e.g., date, location)	F-3 Make travel reservations (e.g., hotel, airline)	F-4 Provide traveler with itinerary	F-5 Cancel travel reservations
G	Participate in Training & Work Group Sessions	G-1 Obtain reporting instructions for personal training	G-2 Attend training/work group session	G-3 Evaluate training/work group session	G-4 Prepare briefing report for training/work group session	G-5 Share training info with co-workers

A-6 Process mail (Fedex, UPS, US mail, internal mail)	A-7 Maintain outlook calendars (personal, managers, employees) by reviewing and updating		A-8 Copy documents	Acronyms TAPS Totally Automated Personnel System SETR Single Entry Time Reporting QIER Time Reporting System for Vita F 3081 Employee Time Report F 2787 Authorization for overtime & comp time F 4913 Time tracking form for vita IRM Internal Revenue Manual QPID System for updating current vita sites VITA Volunteer Income Tax Assistant RTS Requisition tracking system NTEU National Treasury Employment Union EEO Equal Employment Opportunity AARP American Association of Retired People TIGTA Treasury Inspector General for Tax Administration TRAS Travel Reimbursement and Accounting System ECMS Executive Correspondence Management Systems SPEC Stakeholder, Partnerships, Education and Communication IT Information Technology		
A-13 Input personnel actions into taps	A-14 Remind manager of due dates and action items	A-15 Process manager's inbox				
B-6 Print SETR reports from prior period	B-7 Input 3081 data into SETR	B-8 Input 4913 data into QIER	B-9 Validate 3081 timesheet			
C-6 Distribute report/correspondence						
D-6 Place order with vendor	D-7 Receive shipment	D-8 Verify shipment for accuracy (e.g., completeness, adjust RTS)	D-9 Distribute supplies	D-10 Reconcile bank statements	D-11 Distribute invoices & bank statements	D-12 File invoices & bank statements
E-6 Prepare meeting agenda	E-7 Make travel arrangements for out-of-town participants	E-8 Copy meeting materials & handouts	E-9 Set up meeting room (e.g., supplies, equipment, audio-visual)	E-10 Order refreshments	E-11 Participate in meeting	E-12 Take meeting minutes
F-6 Input travel voucher	F-7 Print travel voucher	F-8 Proof travel voucher (ensure receipts are accurate)	F-9 Edit travel voucher	F-10 Maintain hard copies of travel vouchers	F-11 Provide travel vouchers for audits/monthly budgets	F-12 Maintain calling card file
G-6 Generate work group meeting minutes	G-7 Compile training material for new trainees	G-8 Train new management assistants	G-9 Prepare self-evaluations (for training of new employees)	G-10 Perform detail assignments		



General Knowledge and Skills

- Computer skills
- Decision making skills
- Communication skills (oral & written)
- Time management skills
- Problem solving skills
- Analytical skills
- Interpersonal skills
- Organizational skills
- Knowledge of organization structure
- Knowledge of business unit
- Prioritization skills
- Knowledge of rules of conduct
- Research skills
- Presentation skills
- Diversity awareness

Worker Behaviors

- Positive attitude
- Good communicator (listening, speaking)
- Self starter
- Reliable
- Ability to maintain confidentiality
- Patient
- Flexible
- Organized
- Team player
- Common sense
- Ethical
- Personable
- Trustworthy
- Diverse
- Punctual
- Good work ethic

Tools, Equipment, Supplies and Materials

- | | |
|-----------------------------------|-----------------|
| Personal desk supplies | Day planners |
| Telephone | Credit cards |
| Voice mail | Phone cards |
| Fax | Filing cabinets |
| Photocopier | Forms |
| Projectors/screens | Business cards |
| Data shows | Burn barrel |
| Computer & software (email) | Shred bin |
| User guides for equipment/systems | Printer |
| | Shredder |

Future Trends and Concerns

- VITA site tracking system will change
- Employees will take over tracking their own time
- Staff changes may reduce number of management assistants required
- External customers will increase
- Automation of ordering supplies systems
- VITA volunteers will become self sufficient
- Job title change from management assistant to project assistant will result in increased responsibility