

U.S. Office of Personnel Management  
Division for Human Capital Leadership & Merit System Accountability  
Classification Appeals Program

Dallas Field Services Group  
Plaza of the Americas, North Tower  
700 North Pearl Street, Suite 525  
Dallas, TX 75201

**Classification Appeal Decision**  
**Under section 5112 of title 5, United States Code**

**Appellant:** [appellant]

**Agency classification:** Educational Technician (OA)  
GS-1702-6

**Organization:** Education Services Flight  
[number] Mission Support Squadron  
[number] Training Wing  
U.S. Department of the Air Force  
[location]

**OPM decision:** Educational Technician (OA)  
GS-1702-6

**OPM decision number:** C-1702-06-01

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Robert D. Hendler  
Classification and Pay Claims  
Program Manager

August 22, 2005

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Date

As provided in section 511.612 of title 5, Code of Federal Regulations, this decision constitutes a certificate that is mandatory and binding on all administrative, certifying, payroll, disbursing, and accounting officials of the Government. The agency is responsible for reviewing its classification decisions for identical, similar, or related positions to ensure consistency with this decision. There is no right of further appeal. This decision is subject to discretionary review only under conditions and time limits specified in the *Introduction to the Position Classification Standards*, appendix 4, section G (address provided in appendix 4, section H).

**Decision sent to:**

[appellant's name and address]

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## **Introduction**

On February 28, 2005, the Dallas Field Services Group of the U.S. Office of Personnel Management (OPM) accepted a classification appeal from [appellant]. The appellant's position is currently classified as Educational Technician (Office Automation (OA)), GS-1702-6. He believes his position should be classified at the GS-7 grade level. The position is assigned to the Education Services Flight, [number] Mission Support Squadron, [number] Training Wing, U.S. Department of the Air Force, at {location} We received the agency's administrative report on March 21, 2005. We have accepted and decided this appeal under the provisions of section 5112 of title 5, United States Code (U.S.C.).

## **Background Information**

The appellant was reassigned from a Transportation Assistant (Personal Property/OA), GS-2102-6, position to the Educational Technician (Office Automation), GS-1702-6, position on March 7, 2004. He understood that the full performance level of the new position was to be GS-7. The agency provided a copy of a correction SF-50 showing that the assigned position is at the full performance GS-6 grade level.

The appellant's supervisor stated that at the time of the appellant's reassignment, the major duties and responsibilities as described in the core position document (CPD) number [number] were accurate. An audit had been conducted in December 2003 that upgraded the position to GS-6. The supervisor said that she was advised that she could request another audit if the duties and responsibilities changed. A proposed CPD was prepared by the supervisor in December 2004, "only to capture complete and accurate major duties and responsibilities -- performing the same grade-controlling duties as employee's position in a similar organization." This proposed CPD was not classified by the agency. The issues raised will be discussed later.

## **General issues**

The appellant does not agree with the CPD. He states that the classification is inconsistent. He believes the complexity of work, level of responsibility, authority, level of contacts, and purpose of contacts are the same as the work of Educational Technician, GS-1702-7, positions at other Air Force installations. The appellant provided copies of two PDs, one of which contains duties that differ in several significant aspects from those of the appellant. However, neither provided any basis for the classification of the work. He also makes various statements about his agency and its evaluation of his position.

In adjudicating this appeal, our only concern is to make our own independent decision on the proper classification of the position. By law, we must classify positions solely by comparing his current duties and responsibilities to OPM standards and guidelines (5 U.S.C. 5106, 5107, 5112). Since comparison to standards is the exclusive method for classifying positions, we cannot compare the appellant's position to others that may or may not have been classified correctly, nor can we consider the appellant's personal qualifications or the quality or quantity of work he performs.

Like OPM, the appellant's agency must classify positions based on comparison to OPM standards and guidelines. However, the agency also has primary responsibility for ensuring that its positions are classified consistently with OPM decisions. If the appellant considers his position so similar to others that they warrant the same classification, he may pursue the matter by writing to his agency headquarters human resources office. In doing so, he should specify the precise organizational location, classification, duties, and responsibilities of the positions in question. If the positions are found to be basically the same as his, the agency must correct their classification to be consistent with this appeal decision. Otherwise, the agency should explain to him the differences between his position and the others.

### **Position information**

The mission of the Education Services Flight is to provide cost-effective, high quality, on-off base degree programs. The organization is responsible for providing services to improve and/or further academic, vocational, and military career levels of the military and civilian personnel; arranging degree completion, technical or occupational preparation and other educational opportunities; providing educational counseling, correspondence courses, and testing programs; and assisting qualified military personnel to apply for various Air Force development programs. The Education Services Flight includes four positions: an Education Services Specialist, GS-1740-12; one Education Specialist (a military position); one Guidance Counselor, GS-1740-9; and the appellant's position. The primary purpose of the appellant's position is to provide advice and assistance to the Flight's clients and to assist the Education Services Specialist in managing resources.

The appellant believes that his CPD does not recognize that he: (1) is responsible for educational counseling and other programs; (2) is responsible for resolving conflicts and complex problems pertaining to the Air Force Automated Educational Management System (AFAEMS); (3) coordinates a \$1 million budget which is then coordinated through higher-level authority of the Air Education and Air Training Command (AETC) for suspenses and taskings; (4) is responsible for conducting Community College Air Force (CCAF) counseling for enlisted instructors; (5) resolves problems pertaining to GI Bill issues, certifications and other related college/educational programs; and (6) is responsible for counseling dealing with a geographically separate unit (GSU). He believes that his position fully meets the GS-7 grade level since he works at a higher level of responsibility.

In his March 18, 2005, written statement, the appellant stressed that his CPD does not describe in depth the duties he performs and that the duties have changed since his assignment. He stated that the revised duties include a higher level of responsibility for counseling, initiating and processing tuition assistance on a daily basis. This includes generating reimbursements, payments for hundreds of invoices, and reconciliations for an average of \$100,000 per month. He discussed resolving "complex problems" and stated that he has trained coworkers on procedures for the Base Job Site Coordinator duties and solves problems when the satellite broadcast equipment malfunctions.

The primary difference between the CPD of record and the proposed CPD, modeled after one from another AF installation, is the addition of a separate duty describing "interviewing and

advising military personnel and their dependents regarding opportunities for personal, educational, and vocational goals and provides initial information on Community College of the Air Force, Air Force Institute of Technology, and Air Force Institute of Advanced Distributed Learning.” This duty is estimated to occupy 25 percent of the proposed position’s time. The total for work time of duties in this proposed PD totals 115 percent.

The record shows that after the appellant was assigned to the position, he became responsible for the tuition assistance program needs including education advising, training records and budget for a geographically separated unit located at the [another military installation] This additional activity increased the number of students and the total amount of funds involved, nearly doubling each. Our fact-finding disclosed that the appellant assists the counselor and specialists by providing general information concerning the programs available, advises students on what classes are available, and on how to prepare the tuition assistant application. He is responsible for preparing monthly reports using the CARE and other systems for the supervisor who is responsible for preparation of the budget and management of funds. The Base Job Site Coordinator duties are a very small portion, i.e. less than 10 percent, of his job and include responsibility to provide user training on equipment, recognize system shortcomings, and take steps to eliminate them. Other responsibilities for that program, as indicated above, include providing information about the system, scheduling broadcasts, and managing and controlling training and examination materials.

A PD is the official record of the major duties and responsibilities assigned to a position by an official with the authority to assign work. A position consists of duties and responsibilities that make up the work performed by the employee. Classification appeal regulations permit OPM to investigate or audit a position and decide an appeal on the basis of the actual duties and responsibilities assigned by management and performed by the employee. An OPM appeal decision classifies a real operating position, not simply the duties and responsibilities presented in the PD.

The CPD of record, ([number]), states that the appellant is the technician primarily responsible for the military tuition assistance (TA) program, including funding, billing, reimbursement, and service commitments. He provides information to students on use of TA money, course and test selections, and the requirements to reimburse Air Force for unsuccessful completion of courses. More in-depth questions are referred to the counselor or program specialist. He is responsible for submission of forms, and preparation of payment vouchers, and financial reports, using automated systems. The appellant manages the Customer Automated Review Environment (CARE) system which enrolls, updates credit hours, and tracks tuition assistance for clients. The TA program occupies 35 percent of his time.

The appellant compiles statistical data for management cost and expenditures in connection with the budget and other educational reports required locally and by higher headquarters. He prepares data for an annual budget using schedules of activities and services. This work takes approximately 15 percent of his time.

The position requires skill in using OA software to prepare a range of documents that may require complex formats such as graphics or tables within text, editing and reformatting

electronic files, and updating or revising existing databases or spreadsheets. He may extract information from files to compile reports. This work requires approximately 20 percent of his time.

The remaining duties include maintaining manual and automated education records for military and Department of Defense civilians, inputting data as needed, and operating and supporting the Air Technology Network (ATN) satellite distance learning program and the job site training program from [another installation]. He answers technical questions about system capabilities and schedules and conducts broadcast system use. He ensures that purchase requests for non-personal service contracts for test administrator and education advisor are submitted and completes forms and invoices. He also ensures that officers receiving tuition assistance are advised of the active duty service commitments and forms completed. These duties each occupy approximately 10 percent of the appellant's work.

To help decide this appeal, we conducted a telephone audit with the appellant on April 21, 2005, and interviewed his immediate supervisor on April 27, 2005. In reaching our decision, we have considered the information obtained from these interviews and all material of record furnished by the appellant and his agency. We find the CPD contains the major duties and responsibilities assigned to and performed by the appellant and we hereby incorporate it by reference into this decision.

### **Series, title, and standard determination**

The Education and Training Technician, Series, GS-1702, covers nonprofessional work of a technical, specialized, or support nature in the field of education and training. The appellant performs clerical and technical support duties that facilitate the work of the Education Services Flight. The appellant's work requires a practical knowledge of the Air Force education program and its objectives, policies, procedures, and requirements. The appellant does not question the series or title of his position. We agree with the agency that the position is properly classified to the GS-1702 series and titled Educational Technician (OA).

The GS-1702 standard does not contain grade level criteria and indicates that positions are to be evaluated by the criteria in standards or guides for work that is most closely related to the position. The Grade Level Guide for Clerical and Assistance Work (Guide) covers the work of processing transactions and performing various office support and miscellaneous clerical and assistance duties within a framework of procedures, precedents, or instructions. The Guide defines assistance work as performing technical work to support the operation of the programs of an organizational unit. The work requires a working knowledge of the processes and procedures of an administrative field and the mission and operational requirements of the unit.

In addition to the knowledge of the education program, the position requires a basic knowledge of accounting or budget principles, the ability to gather data for various reports, ability to effectively communicate orally and in writing, knowledge of several types of software to perform a variety of office needs, and the skills of a qualified typist. As the financial support work is only a portion of the total job, occupying approximately 25 percent of the time, we find the Guide best suited to evaluate the overall worth of the position. We will also review the

financial support work by comparison with the Job Family Standard for Clerical and Technical Accounting and Budget Work, GS-500 (GS-500 JFS). The OA is evaluated by comparison with the OA Grade Evaluation Guide (OAGEG).

## **Grade determination**

### ***Evaluation using the Grade Level Guide for Clerical and Assistance Work***

The Guide provides general criteria for use in determining the grade level of non-supervisory clerical and assistance work. The Guide describes the general characteristics of each grade level from GS-1 to GS-7 and uses two factors for grading purposes (1) nature of assignment, which includes knowledge required and complexity of the work, and (2) level of responsibility, which includes supervisory controls, guidelines, and contacts.

#### *Nature of assignment*

At the GS-6 grade level, technical or assistance work requires considerable evaluative judgment within well-defined, commonly occurring aspects of an administrative program or function. The work may involve providing direct assistance to specialists or analysts by performing a segment of their work, or it may involve responsibility for a stream of products or continuing processes based on direct application of established policies, practices and criteria. Assignments involve a relatively narrow range of situations that occur in a broad administrative program or function. This work typically involves identifying issues, problems, or conditions and seeking alternative solutions based on evaluation of the intent of applicable rules, regulations, and procedures.

At this level, assignments requiring evaluative judgment are narrowly focused, address a single product or action, and are relatively clear cut. The employee usually deals with problems that remain stable and resemble past problems or situations. There may not be one absolutely correct solution, only a best or most appropriate one. Work requires practical knowledge of guidelines and precedent case actions relating to a program area equal to that acquired through considerable work experience or specialized training. The work also requires the skill to recognize the dimensions of a problem and express ideas in writing.

At the GS-7 grade level, work consists of specialized duties with continuing responsibility for projects, questions, or problems that arise within an area of a program or functional specialty. Assignments involve a wide variety of problems common to the function for which the employee is responsible. Typically, assignments consist of a series of related actions prior to final completion. Decisions or recommendations are based on development and evaluation of information that comes from various sources. The work involves identifying and studying factors and determining their interrelationships to the defined area of work. The employee must be concerning about taking or recommending actions that are consistent with the objectives and requirements of the program.

The work at the GS-7 grade level requires knowledge and skill to recognize the dimensions of the problems involved, collect the necessary information, establish the facts, and take or recommend action based on established guidelines. The work also requires practical knowledge,

developed through increasingly difficult, on-the-job training or experience dealing with operations, regulations, principles, and peculiarities of the assigned program function or activity.

The GS-6 grade level is met. Like that level, the appellant provides the clerical and technical support for the Education Services Flight involving a relatively narrow range of situations in an administrative function. He assists specialists by providing information to customers on a variety of established procedures and guidelines regarding different educational programs. He conveys established program guidelines and provides customers with information on which they make clear choices. Situations requiring extensive analysis and/or weighing of alternatives are handled by the counselor or program specialist. The appellant's primary duties involve the AF tuition assistance program. This includes responsibility for providing basic information to students on the programs available and assuring service commitments. He is also responsible for the financial aspects including billing, funding, and reimbursements. He verifies, reconciles, and pays invoices using various automated accounting systems and compiles financial reports and data used for budget purposes. Comparable to the example provided at the GS-6 grade level, the work requires an in-depth practical knowledge of the activities, operations, and established guidelines of the program, including the financial processing systems, budget processes, and education records system. He uses judgment and skill to monitor funds and resolve billing discrepancies to recover funds.

The GS-7 grade level is not met. Although the appellant retrieves and collects information for the Flight's tuition assistance costs, financial reports, and statistical data, he does not have continuous and final administrative responsibility to manage those functions, as described at the GS-7 level. He provides data as input to the supervisor who is responsible for preparation of the budget and management of budgeted funds for the organization. Most of his tasks involve processes and procedures that are carried out on a daily basis and are generally stable with applicable precedents rather than those requiring that he identify or study factors or conditions and determine their interrelationships prior to completion as typical of the GS-7 grade level.

#### *Level of responsibility*

At the GS-6 grade level, the supervisor assists with precedent assignments by providing an interpretation of policy or the concepts and theories of the occupation. Completed work is evaluated for appropriateness and effectiveness in meeting goals. Guidelines such as regulations, instructions, evaluation criteria, and prior case files are available, but are often not completely applicable to the assignment or have gaps in specificity. The employee uses judgment to interpret and adapt guidelines to specific problems. Decisions and recommendations are based on facts and conventional interpretations of guides rather than on theory or opinion. The employee contacts others to provide, receive, or develop information to identify problems, needs, or issues and/or to coordinate work or resolve problems.

At the GS-7 grade level, the supervisor makes assignments in terms of objectives, priorities, and deadlines. The employee independently completes assignments in accordance with accepted practices, and resolves most conflicts. Completed work is reviewed for appropriateness and conformance to policy. Guides, such as regulations, policy statements, and precedent cases tend to be general and descriptive of intent, but do not specifically cover all aspects of the assignment.



The guides apply less to specific actions and more to the operational characteristics and procedural requirements of the function. Employees must use significant judgment and interpretation to apply guides to specific cases and adapt procedures to accommodate unusual situations. The contacts and their purpose are usually the same as GS-6 grade level. However, the employee, to a greater degree, serves to as a central point of contact to provide authoritative explanations of requirements, regulations, and procedures, and to resolve operational problems or disagreements.

The GS-6 grade level is met. Comparable to the GS-6 grade level, the supervisor makes assignments by defining the objectives, setting priorities, and the suspenses to be met. She assists with unusual situations with no clear precedent. The appellant is expected to plan and carry out work assignments in accordance with instructions, policies, previous training, or accepted practices. Work is reviewed for technical soundness and appropriateness. Guidelines are available but are not completely applicable or have gaps. The appellant is expected to use judgment in selecting and interpreting the appropriate guidelines to the specific situation. Like the GS-6 level, the appellant's primary contacts are with coworkers and military, dependents, and civilian student enrollees, to assist them by providing information, processing, and inputting information relating to education services programs and to resolve working problems.

The GS-7 grade level is not met. The assignments are more clearly defined by procedures and instructions than typical at the GS-7 level. While the appellant works independently and work is evaluated for technical soundness and conformance to policy, the supervisor provides guidance in unusual situations. Although the appellant works with different educational programs and the funding/reimbursement processes used in connection with them, this work requires use of fewer guidelines than is typical for a program involving a broad range of administrative program areas such as budgeting, purchasing, supply management, personnel administration, data processing, and files management, as illustrated in the Guide at the GS-7 grade level.

By comparison with the Guide, the duties and responsibilities of the position are at the GS-6 grade level.

### ***Evaluation Using the GS-500 JFS***

The JFS is written in the Factor Evaluation System (FES) format. Under the FES, positions are placed in grades on the basis of their duties, responsibilities, and the qualifications required as evaluated in terms of nine factors common to nonsupervisory General Schedule positions. A point value is assigned to each factor based on a comparison of the position's duties with the factor-level descriptions in the standard. The factor point values mark the lower end of the ranges for the indicated factor levels. For a position factor to warrant a given point value, it must be fully equivalent to the overall intent of the selected factor-level description. If the position fails in any significant aspect to meet a particular factor-level description in the standard, the point value for the next lower factor level must be assigned, unless the deficiency is balanced by an equally important aspect which meets a higher level. The total points assigned are converted to a grade by use of the grade conversion table in the standard.

### *Factor 1, Knowledge required by the position*

This factor measures the nature and extent of information or facts, which the employee must understand to do acceptable work and the nature and extent of skills needed to apply that knowledge. To be used as a basis for selecting a level under this factor, knowledge must be required and applied.

At Level 1-3, work requires knowledge of standardized regulations, requirements, procedures, and operations associated with clerical and technical duties related to the assigned support function. This includes knowledge to perform a full range of accounting, budget, or financial management support duties related to recurring or standardized transaction; knowledge of procedures to support transactions involving use of different forms and application of different procedures; knowledge of one or more automated data bases associated with accounting functions to input a range of standard information of adjustments, understand recurring error reports and take corrective action, and generate a variety of standard reports; and knowledge of structure and content of documents to investigate and resolve routine or recurring discrepancies.

At Level 1-4, the work requires in-depth or broad knowledge of a body of accounting, budget, or other financial management regulations, practices, procedures, and policies related to the specific functions. This may include knowledge of a variety of accounting and budget functional areas and their relationships to other functions to investigate problems or errors that require reconciling and reconstructing incomplete information, conducting searches for required information or actions of similar complexity and/or knowledge of automated accounting and budget systems to reconcile errors that require understanding of nonstandard procedures or to provide assistance in development of automated procedures for clerical operations.

The appellant's position meets Level 1-3. The record shows there is no requirement for applying an in-depth knowledge of accounting or budget as described at Level 1-4. Unlike Level 1-4, the appellant is not required to deal with and resolve complex accounting or nonstandard transactions. His work does not require knowledge of automated accounting and budget systems to reconcile errors that require understanding of nonstandard procedures and does not routinely present him with the opportunity to assist in development of automated procedures for clerical operations, as described at Level 1-4. Instead, his work consists of dealing with standardized and recurring transactions that can be corrected using well-established procedures and processes.

Level 1-3 (350 points) is credited.

### *Factor 2, Supervisory Controls*

This factor measures the nature and extent of supervision exercised over the position. Controls measured by this factor include the way assignments are made, the way priorities and deadlines are set, and the way work is reviewed.

At Level 2-2, the supervisor provides general standing instructions on recurring assignments, indicating what is to be done, applicable policies, procedures and methods, data and information required, quality and quantity of work expected, priority of assignments, and deadlines. The

supervisor provides additional, specific instructions for new, difficult, or special assignments. Standing instructions may cover steps involved in processing documents or transactions. The employee uses initiative to perform recurring assignments and resolves recurring clerical or technical tasks without specific instructions. Situations not covered by instructions or precedents are referred to the supervisor. Finished work and methods used are checked to assure technical accuracy and compliance with established instructions and methods. Recurring assignments are reviewed through quality control procedures and some work may be spot checked. Unusual assignments are usually checked in more detail.

At Level 2-3, the supervisor makes assignments with standing instructions on objectives, priorities, and deadlines, and provides guidance for unusually involved situations. Work may be assigned by a standardized control system that provides general instructions. The employee independently processes the most difficult procedural and technical tasks and handles problems in accordance with instructions, policies, or accepted practices. Completed work is evaluated for technical soundness, appropriateness, and conformity to policy and requirements. This work is reviewed by sampling in a quality review system and/or spot checked by the supervisor for results and conformity to established requirements and deadlines. The methods used are seldom reviewed in detail.

The appellant's position meets Level 2-2. The supervisor provides continuing assignments by indicating what is to be done, limitations, quality and quantity expected, deadlines, and priorities. She assists with unusual situations that do not have clear precedents. The appellant uses initiative in carrying out recurring assignments independently without specific instructions, but refers deviations, problems, and unfamiliar situations to the supervisor for help. Like the Level 2-3, the record indicates that the appellant's work is reviewed for technical soundness, appropriateness, and conformity to policy and requirements. While the appellant does independently carry out assignments, Level 2-3 requires the application of judgment necessary for processing the most difficult procedural and technical tasks or actions, e.g., independently determines the types and sources of information needed to complete the transaction, nature and extent of deviations from established requirements, and whether standard techniques, methods or procedures are appropriate. As the appellant's financial support transactions are generally standardized, his work does not require the exercise of Level 2-3 judgment. Since Level 2-3 is not fully met, Level 2-2 (125 points) must be credited for this factor.

### *Factor 3, Guidelines*

This factor measures the nature of guidelines and the judgment needed to apply them.

At Level 3-2, there are a number of established procedures and specific guidelines such as agency policies and procedures, Federal codes and manuals, specific related regulations, precedent actions, and processing manuals readily available. Judgment is required to identify and select the most appropriate, and making minor deviations to adapt to specific cases. Situations where guides cannot be applied or require significant deviations are referred to the supervisor.

At Level 3-3, guidelines are the same as Level 3-2, but because of the complicating nature of the assignments, they lack the specificity, frequently change, or are not completely applicable to the

work requirements, circumstances or problems. The employee uses judgment to interpret guidelines, adapt procedures, decide approaches, and resolve specific problems.

Level 3-2 is fully met. The appellant has agency procedures and systems manuals available to use when coding tuition reimbursement and other information into AFAEMS, CARE and other systems. Like at Level 3-2, the appellant may have to rely on judgment to determine the appropriate guidance to apply. The accounting/budget duties involve more specific guidelines than those applicable to the other duties of the position. The financial support work is not so complex as to require the more extensive interpretation of guidelines typical of Level 3-3.

Level 3-2 (125 points) is credited.

#### *Factor 4, Complexity*

This factor measures the nature, number, variety, and intricacy of tasks, steps, processes, or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality in performing the work.

At Level 4-3, the work includes various financial duties involving different and unrelated processes and methods. The employee decides what needs to be done by identifying the nature of the problem and determining the need for obtaining additional information. The employee may have to consider previous actions and understand how they differ from or are similar to the issues at hand. The employee makes recommendations or takes actions based on case-by-case review of issues involved. For example, employees use different established procedures to review and reconcile various financial documents and records, resolve problems through coordination with vendors and employees and review and reconcile various types of transactions involving multiple funds or a number of different control accounts.

Level 4-4 is distinguished from the previous level by the variety and complexity of transactions or systems involved, the nature and variety of problems encountered and resolved, and the nature of independent decisions made by the employee. Decisions include assessing unusual circumstances, developing variations in approach to fit problems, or dealing with incomplete or conflicting data. The work requires making decisions, devising solutions and taking actions based on program knowledge.

The work meets Level 4-3. As the sole support technician for the organization, the appellant must prepare obligation authorities in a timely manner; reconcile billing invoices using automated systems; input grades into the AFAEMS systems to allow reimbursements; and verify, reconcile, and pay invoices involving six different accounts. He recovers funds by resolving past invoice discrepancies. The appellant also compiles data for use in budget, financial, and other management reporting processes. The appellant's work does not involve the greater variety and complexity of transactions and systems involved, nor does it require solving more complex problems and independent decision making typical of Level 4-4. The JFS notes that Level 4-4 may only be assigned when the work requires the knowledge consistent with Level 1-5.

This factor is credited at Level 4-3 (150 points).

*Factor 5, Scope and effect*

This factor covers the relationship between the nature of the work, as measured by the purpose, breadth, and depth of the assignment, and the effect of work products or services both within and outside the organization.

At Level 5-2, the purpose of the work is to apply specific rules, regulations, or procedures to perform a full range of related accounting, budget, or financial management clerical or technical work. Assignments are covered by well-defined procedures and regulations. The work affects adequacy and efficiency of the accounting and budget function and can affect the reliability of work of specialists in related functions, affect accuracy of further processes and/or reliability of financial support services provided to users and customers.

At Level 5-3, the purpose of the work involves applying conventional practices to treat a variety of accounting or budget transaction problems. Issues might result from insufficient information, need for more efficient processing procedures, or requests to expedite urgently needed cases. The work affects the quality, quantity, and accuracy of the organization's records, program operations, and service to clients. The JFS notes that only a few positions will be evaluated at this level.

Level 5-2 is met. Comparable to that level, the purpose of this portion of the position is to maintain records pertaining to tuition assistance billings and reimbursements, and assisting the supervisor with information and data for the budget. The financial support work performed involves standard transactions that do not approach the level of problems, the need to resolve processing procedures, or the broader impact typical at Level 5-3.

Level 5-2 (75 points) is credited for this factor.

*Factor 6, Personal contacts and Factor 7, Purpose of contacts*

This combined factor matches the level of regular and recurring personal contacts with the purpose of the contacts.

*Personal contacts*

At Level 2, contacts are with employees in the same agency, but outside the immediate organization. Persons contacted may be employees in other functional areas. Contacts may also be with members of the general public in a moderately structures setting. In contrast, Level 3, contacts are with members of the general public in a moderately unstructured setting. The purpose and extent of each contact may be different, and the role and authority of each party is identified and developed during the course of the contact. These contacts are not established on a routine basis. Typical contacts might include attorneys, contractors, the news media, or public action groups.

The appellant's personal contacts meet Level 2. His primary contacts are with the Education Services Flight staff, military personnel of all ranks, their dependents, and civil service employees. The appellant's contacts do not meet Level 3 as they are more structured and do not

require him to identify and develop the role and authority of each party to the extent found at that level.

*Purpose of contacts*

At Level b, the purpose of contacts is to plan and coordinate actions to correct or prevent errors, delays, or other problems during the transaction cycle. This may involve getting customer cooperation, requesting others to correct errors, or assisting others in locating information. In contrast, Level c, contacts are to persuade individuals who are fearful, skeptical, uncooperative, or threatening to provide information, take corrective action, and accept findings to gain compliance with established laws and regulations.

Level b is met. The appellant, in addition to providing and clarifying information to process and input documentation relating to educational services programs, plans and coordinates so that documents related to billings, reimbursements, and financial reports are received and processed in a timely manner which meets Level b. His contacts are with persons with mutual goals and do not involve persuading uncooperative or fearful people as typical of Level c.

This factor is credited at Level 2b for (75 points).

*Factor 8, Physical demands*

This factor measures the requirements and physical demands placed on the employee by the work assignment. Comparable to Level 8-1, the appellant's work is primarily sedentary and may involve some walking, standing, bending, and carrying light items. No special physical demands are required to perform the work.

Level 8-1 (5 points) is credited.

*Factor 9, Work environment*

This factor measures the risks and discomforts in the employee's physical surroundings or the nature of the work assigned and the safety regulations required. The appellant's work is performed in an office environment or conference room as described in Level 9-1. Normal safety precautions are required.

Level 9-1 (5 points) is credited.

### *Summary*

Factor	Level	Points
1. Knowledge required by the position	1-3	350
2. Supervisory controls	2-2	125
3. Guidelines	3-2	125
4. Complexity	4-3	150
5. Scope and effect	5-2	75
6. Personal contacts, and		
7. Purpose of contacts	2b	75
8. Physical demands	8-1	5
9. Work environment	9-1	5
Total Points		910

The financial support work is credited with 910 points. The grade conversion table shows that 960 points falls within the point range for GS-5 (855 – 1100 points).

### ***Evaluation using the Office Automation Grade Evaluation Guide***

The appellant's office automation duties cannot be grade higher than the primary duties of the position since they do not routinely involve a wide variety of non-standard automation problems or assignments requiring knowledge of advance functions or more than one type of software, e.g., developing methods for automating complex administrative reports, including the detailed functional procedures needed to automate the data. The appellant uses a variety of standard software functions and standard agency automated systems, resulting in a lower grade level than for the clerical, technical, and financial support work. Therefore, his OA work does not impact the final grade level worth of the position.

### **Summary**

By comparison with the Guide, the primary duties of the clerical and technical support of the Education Services Flight are graded at the GS-6 grade level. By comparison with the GS-500 JFS, the financial support duties equate to the GS-5 grade level.

### **Decision**

The appellant's position is properly classified as Educational Technician (OA), GS-1702-6.