

## POSITION DESCRIPTION

### I. POSITION

TITLE: Secretary  
POSITION NUMBER:  
DEPARTMENT: Department of Budget and Finance  
DIVISION: Hawaii Employer-Union Health Benefits Trust Fund  
GEOGRAPHIC LOCATION: Honolulu

### II. INTRODUCTION (*Purpose of this position*)

The Secretary is the personal assistant to the Fund Administrator who is responsible for the daily administration of the Hawaii Employer-Union Health Trust Fund, the entity which provides health benefit plans to active public employees and retired employees of the State and counties.

The Secretary performs a variety of clerical work for the Administrator and Board of Trustees as well as other administrative work assigned by the Administrator.

### III. MAJOR DUTIES AND RESPONSIBILITIES

Secretarial Duties for the Fund Administrator 70%

1. Assists Administrator by handling various details connected with Administrator's work, such as:
  - Scheduling and updating the Administrator's calendar of activities and meetings
  - Preparing files/materials needed for Administrator's meetings
  - Following-up on Administrator's requests for information, etc.
  - Acting as a liaison between Administrator and managers by transmitting instructions/directions to managers, obtaining information requested by Administrator, etc.
  - Screening Administrator's phone calls, routes calls to appropriate manager or employee; handling complaint or inquiry calls made to Administrator as appropriate
  - Sorting and distributing incoming correspondence; preparing responses to routine correspondence for the Administrator or routing routine correspondence to the appropriate manager for response and following-up to ensure a timely response is made.
2. Establishes and maintains administrative files and filing system; ensures that retention schedule for files is followed.

3. Prepares correspondence and documents in required formats for such documents as legislative bills, invitation-for-bids, request-for-proposals, and bid contracts, etc., and distributes final documents to the appropriate agencies. Assists in tracking the status of documents pending further action.
4. Assists in obtaining and organizing supporting documents needed for health fund initiatives such as legislative bills, administrative rules, procurement requests, etc.

**Secretarial Duties for the Board of Trustees** **20%**

1. Arranges Board meetings and handles the administrative details associated with the board meetings, including trustee travel arrangements (transportation and hotel reservations), per diem allowances, parking reimbursements, filing of the meeting notice, distribution of meeting notices, distribution of the meeting handouts, etc.
2. Takes minutes at Board meetings and transcribes the minutes.
3. Prepares routine correspondence for Board chairperson.
4. Establishes and maintains Board files and filing system.

**Other Duties** **10%**

1. Maintains the inventory for office supplies, furniture, and equipment. Obtains price quotations, orders, and prepares purchase orders or requisitions for office supplies, equipment, furniture; equipment maintenance in accordance with DAGS policies and procedures and performs other necessary office management activities such as coordinating new phone services, office layout office maintenance services, etc.
2. Maintains the Fund's personnel records and coordinates filling of vacant Fund positions with B&F Personnel.
3. Acts as liaison with B&F Personnel, including maintaining individual employee leave records, coordinating employee relation activities, assisting employees with personnel-related questions, etc.
3. Processes time sheets for carrier contract workers and monitors use of contract workers by tracking hours used.
4. Assigns, reviews, plans and schedules work assignments of subordinate staff. Trains and develops subordinate staff.

**IV. POSITIONS SUPERVISED**

- Clerk Typist (*Assists Secretary in office administrative work and Administrator and Board's clerical work and performs clerical services for managers*)

**V. CONTROLS EXERCISED OVER THE WORK**

Supervisor: Fund Administrator

Nature of Control: Works independently under general direction of the Fund Administrator.

Type of Controlling Guidelines Available:

- Chapter 87A, HRS
- Chapter 92, HRS
- Administrative Policies and Procedures Manual
- Administrative Rules of the Department of Human Resources Development
- Various DAGS policies and procedures
- Fund Trust Document and Rules

**VI. MINIMUM QUALIFICATIONS**

Three years as a secretary to an administrator or executive level manager.

**EQUIPMENT**

1. Standard office machines such as personal computer, copier, Fax, postage machine, multi-line telephone

**KSA** (*necessary to successfully perform duties – some KSA may be learned on the job*)

1. Knowledge of business English; spelling; arithmetic; general and special office practices and procedures; operation and maintenance of various office equipment; principles and practices of secretarial work.
2. Overall knowledge of Fund operations such as Chapter 87A, HRS, Fund rules, Fund benefits, and Enrollment and Accounting processes and procedures.
3. Ability to plan, organize and execute a broad range of secretarial and clerical functions.
4. Ability to organize, assign, direct and review the work of others.
5. Ability to learn and apply knowledge of the organization, procedures, and key personnel.

**DRAFT**

**11/15/01**

**Secretary**

6. Ability to compose various types of business letters, summaries and reports using the appropriate format and proper grammar and style.
7. Ability to read and understand technical information and clearly communicate such information to employees and the public.
8. Ability to interpret and apply various statutes, policies, rules, regulations, procedures issued by various governmental agencies.
9. Ability to tactfully deal with others within and outside the organization.
10. Proficient use of Microsoft Office programs: Word, Excel, and Power Point.
11. Typing at 60 wpm