



Canadian  
Supply Chain  
Sector Council

Conseil canadien  
sectoriel de la chaîne  
d'approvisionnement

## OCCUPATIONAL STANDARD

(For use in the development of supply chain related job descriptions, performance evaluations, career development plans, etc.)

<b>Position:</b>	<b>RATE CLERK</b>
<b>Description of Position (As defined by the CSCSC Stakeholder Community)</b>	<i>Rate Clerks compile data, compute fees and charges, and prepare invoices for billing purposes.</i>
<b>Position Development</b>	Progression to supervisory and management positions is possible through experience and with additional training.
<b>Required Qualifications:</b>	<b>(Education, Training, Related Work Experience)</b>
<b>Education and Additional Requirements</b>	Rate Clerks at minimum require a high school diploma. Completion of college (diploma in a business field such as supply chain management), or other courses certified by the Certified General Accountants Association of Canada, Canadian Securities Institute or Canadian Bookkeepers Association may be required.
<b>Training</b>	Employees in these occupations require regular trainings in specialized computer software.
<b>Related Work Experience</b>	Previous specialized bookkeeping, billing and accounting software use related skills, knowledge, and customer service experience is usually required.
<b>Tasks:</b>	
<b>Purchasing and Inventory Clerks perform some or all of the following tasks</b>	<ul style="list-style-type: none"> <li>• Prepare itemized statements, bills, or invoices and record amounts due for items purchased or services rendered and verify accuracy of data</li> <li>• Perform bookkeeping work, including posting data or keeping other records concerning costs of goods or services or the shipment of goods</li> <li>• Compute costs and calculate rates for goods, services, and shipment of goods based on estimates, quotations, and price lists</li> <li>• Review compiled data on operating costs and revenues to set rates</li> <li>• Consult sources such as rate books, manuals, or insurance</li> </ul>

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	<p>company representatives to determine specific charges or information such as rules, regulations, or tax and tariff information</p> <ul style="list-style-type: none"> <li>• Update manuals when rates, rules, or regulations are amended</li> <li>• Keep records of invoices and support documents</li> <li>• Resolve discrepancies in accounting records</li> <li>• Respond to customer inquiries, maintain good customer relations and solve problems</li> <li>• Contact customers to obtain or relay account information</li> <li>• Perform related clerical duties, such as word processing, maintaining filing and record systems, faxing and photocopying</li> </ul>
<b>Tools and Technology:</b>	
	<ul style="list-style-type: none"> <li>• Computer Hardware and Associated Software and Systems (i.e. accounting software, database management, electronic mail, word processing, spreadsheet, Internet)</li> <li>• Typing, adding, calculating, or billing machines</li> </ul>
<b>Required Competencies:</b>	<b>(Knowledge, Skills, Personal Attributes)</b>
<b>Knowledge</b>	A Rate Clerk should have knowledge of supply chain, awareness of current or relative market knowledge and conditions to the region or services rated, production and processing, customer and personal service, relevant tools and technology, applicable regulations and standards, administration and management, English language, other languages as required, and mathematics.
<b>Skills</b>	<ul style="list-style-type: none"> <li>• A Rate Clerk should have the following skill sets: active listening and learning, reading comprehension, coordination, speaking, critical thinking, time management, writing, service orientation, and monitoring.</li> <li>• Advanced computer skills to operate bookkeeping, billing and accounting software are required as well as a broad range of other computer skills to access information from the Internet and communicate with customers, suppliers and co-workers.</li> </ul>
<b>Personal Attributes</b>	<b>(Abilities, Work Values, Work Styles)</b>
<b>Abilities</b>	The following abilities are important to the role of Rate Clerk: written expression and comprehension, oral expression and comprehension, problem sensitivity, speech clarity and recognition, inductive and deductive reasoning, mathematical reasoning, and selective attention.
<b>Work Values</b>	Individuals who will succeed in this position will value providing service to others, working with co-workers in a friendly environment, having

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	independence to make decisions with supportive management, and safe working conditions.
<b>Work Styles</b>	The following work styles are attributable to a Rate Clerk: integrity, attention to detail, dependability, cooperation, stress tolerance, independence, initiative, persistence, adaptability/flexibility, and self control.
<b>Essential Skills Profile:</b>	Essential Skills are the skills needed for work, learning and life. They provide the foundation for learning all other skills and enable people to evolve with their jobs and adapt to workplace change. For more detailed essential skills profiles please refer to the ESDC website: <a href="http://www.esdc.gc.ca/eng/jobs/les/index.shtml">http://www.esdc.gc.ca/eng/jobs/les/index.shtml</a>
<b>Reading Text</b>	<ul style="list-style-type: none"> <li>• Frequently read short text entries on forms, short comments on invoices, memos and bulletins, mail and letters from customers, suppliers and co-workers, short notes from co-workers, policy and procedure manuals</li> <li>• May read brochures, information releases and newsletters</li> </ul>
<b>Document Use</b>	<ul style="list-style-type: none"> <li>• Utilize, complete and/or read manufacturer and supplier listings, purchase requisition/order forms, estimates, back order lists, product labels, shelving labels, inventory sheets, invoices, shipping forms, packing slips, bills of lading, work schedules, etcetera</li> <li>• Locate data, such as names, dates, codes and dollar values, on file tabs, computer screens and daily control logs</li> <li>• Enter information on tables, schedules or other table-like text</li> <li>• May create graphs and charts integrating purchasing and inventory information</li> </ul>
<b>Writing Skills</b>	<ul style="list-style-type: none"> <li>• Write communications to co-workers, supervisors, suppliers, and both internal and external customers</li> <li>• Write brief entries on purchase requisitions/orders</li> <li>• Write emails and short letters</li> <li>• May write procedures</li> </ul>
<b>Numeracy</b>	<ul style="list-style-type: none"> <li>• Apply money math</li> <li>• Apply scheduling, budgeting and accounting math</li> <li>• Apply measurement and calculation math</li> <li>• Apply data analysis math</li> <li>• Utilize numerical estimation</li> <li>• Understand fuel surcharges and other accessorial for transportation services</li> </ul>
<b>Oral Communication</b>	<ul style="list-style-type: none"> <li>• Interact with management, supervisors, staff, customers, and/or</li> </ul>

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	<p>suppliers to obtain information, get direction, and to problem solve</p> <ul style="list-style-type: none"> <li>• Interact with other staff regarding orders and scheduling</li> <li>• May instruct other employees to complete tasks</li> <li>• Participate in staff meetings</li> </ul>
<b>Thinking Skills</b>	<b>(Problem Solving, Decision Making, Job Task Planning and Organizing, Significant Use of Memory, Finding Information)</b>
<b>Problem Solving</b>	<ul style="list-style-type: none"> <li>• May encounter delays due to equipment faults</li> <li>• May discover that financial records are inaccurate, incomplete and missing</li> <li>• Awareness of potential to be more competitive in revenue growth and/or costs control</li> </ul>
<b>Decision Making</b>	<ul style="list-style-type: none"> <li>• May decide the order of tasks and their priorities</li> <li>• May choose or recommend methods and procedures</li> </ul>
<b>Job Task Planning and Organizing</b>	Rate Clerks completely organize their tasks to deal with the days' priorities. They respond to urgent special requests and in conjunction with their supervisors, they set the order and priority of job tasks according to deadlines.
<b>Significant Use of Memory</b>	<ul style="list-style-type: none"> <li>• Memorize general ledger and project codes</li> <li>• Remember policies and procedures relevant to purchasing activities</li> <li>• Remember deadlines</li> <li>• Remember passwords, categories of items, specific customer names, and specialized and/or frequently used supplier names</li> <li>• Remember a variety of requests from customers, brokers, suppliers and other departments in order to respond to their questions</li> </ul>
<b>Finding Information</b>	<ul style="list-style-type: none"> <li>• Locate information about customers by reviewing financial statements, files and reports and by speaking with co-workers</li> <li>• Check accounts for accuracy and resolve discrepancies in financial records by consulting invoices and other documents in the files, using computer systems and archives and by seeking required information from co-workers and staff in other departments</li> </ul>
<b>Working with Others</b>	Rate Clerks work independently; however Rate Clerks may also work as members of a team with all stakeholders coordinating tasks in their area of responsibility.
<b>Continuous Learning</b>	Rate Clerks have an ongoing need to learn. They update their knowledge of accounting software, generally accepted accounting principles and international financial reporting standards regularly and receive routine training on company policies and procedures. They may attend seminars and industry training programs.

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<b>Additional Information (Physical Aspects, Attitudes)</b>	
<b>Physical Aspects</b>	Rate Clerks works extensively in an office environment, sitting for long periods of time with repetitive computer and telephone use. Typically there is no heavy lifting, bending, or stooping required.
<b>Attitudes</b>	Rate Clerks must adhere to a code of ethical conduct, have good communication skills, be positive, organized, detail oriented, personable, willing to work with others and accurate when transferring information.
<b>Future Trends Affecting Essential Skills:</b>	Software and hardware developers are improving ease of use for workers through touch-screen technology, built-in self-help tutorials and more user-friendly software applications. Tasks done manually, such as entering dates, times and amounts into forms, are completed with speed and accuracy using specialized accounting software. In addition, introduction of cloud computing and radio frequency identification (RFID) technology will require more specialized knowledge of data collection and storage using Internet. Such increase in computerization will require for Rate Clerks to have enhanced computer skills in order to work with more complex software platforms, communication tools, and technology. Rate Clerks will routinely need to upgrade their computer skills.

<b>Government of Canada Defined - Related NOC Code &amp; Description</b>	<p><b>1431 Accounting and related clerks</b></p> <p>Accounting and related clerks calculate, prepare and process bills, invoices, accounts payable and receivable, budgets and other financial records according to established procedures. They are employed throughout the private and public sectors.</p>
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<b>Document Management:</b>				
Activity #	Activity Type*	Replaces	New Version Name	Responsible Individual
1	Document Created	Not Applicable	August 18, 2015	I. Vasileski (CSA)
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**\*Activity Types:**

- ✓ Document Created
- ✓ Document Modified (Minor Corrections & Editorial Changes)
- ✓ Document Updated (Complete Review)
- ✓ Document Finalized
- ✓ Document Retired

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