

OFFICE ASSISTANT SPECIALIST**DEFINITION:**

Under general supervision, performs specialized clerical, office-technical and/or secretarial work of above-average difficulty and complexity in a variety of office settings throughout the County; and does related or other work as required in accordance with Rule 3, Section 3, of the Civil Service Rules.

CLASS CHARACTERISTICS:

This is the specialist-level class in the Office Assistant series. Positions must meet specific criteria for allocation to this class and are not multi-allocated with other levels in the series. Incumbents are expected to apply a moderate amount of initiative and independent judgment to perform a limited range of complex duties utilizing specialized procedures within established policies. The specific duties performed by incumbents may be unique to the work area and, depending upon the assignment, usually require an advanced understanding of specialized and/or technical subject matter. Typical job assignments that fit the class concept include, but are not limited to: clerical work that requires in-depth knowledge, interpretation and explanation of complex program policies and procedures; advanced clerical accounting, specialized billing and/or collections work; clerical/technical/financial case management in areas such as law enforcement, probation, or mental health services; preparation of complex legal documents and coordination of legal-clerical activities in a non-legal office setting; and advanced responsibility for coordinating complex services/activities with outside agencies/providers. Although incumbents may perform some repetitive tasks involving complex clerical processes (i.e., advanced clerical accounting, billing, and collections work), duties are usually program-oriented as opposed to task oriented, requiring an in-depth understanding of the unique programmatic functions of the work area in order to establish the basis for decision-making. Such decisions may require quick action and may have significant financial, legal and/or public relations consequences.

This class differs from Senior Office Assistant because incumbents of the latter perform less difficult/complex clerical, secretarial and/or office technical work of a general (not specialized) nature, utilizing well-established and standardized procedures that do not require the degree of program or process-specific knowledge expected of incumbents in this class.

TYPICAL DUTIES:

1. Provides specialized and complex information, including specific program-related information, to managers, patients, clients, outside agencies and others; researches difficult and complex issues; completes complex forms for the purpose of documenting specialized program-related information; searches for, receives and explains complex rules, regulations, policies, procedures and technical office operations; interprets and applies external laws, regulations, ordinances and policies as they relate to clerical/technical/financial functions; may issue complex documents; provides customer service in a calm, helpful and effective manner.
2. Gathers, processes and maintains specialized and complex information related to departmental operations; asks in-depth questions of patients, clients, and others; identifies customer needs and seeks to match those needs with program

services; codes, files and retrieves documents and records using various alphabetical, numerical, coded and computerized filing systems.

3. Researches, compiles, maintains and processes statistical, financial and/or other numerical data to support specialized office functions; coordinates and/or performs routine work related to personnel, payroll, budgetary, purchasing, inventory, and/or other administrative functions; performs complex accounts payable/receivable and billing procedures, applying advanced knowledge of technical program requirements; maintains ledgers and accounts; enters data into worksheets; matches invoices with orders, reviewing and verifying for completeness, accuracy, and appropriateness as assigned; computes, collects and receipts monies and fees, including large sums; adjusts accounts within limits of authority; may develop and maintain spreadsheets and databases, either by hand or computer; maintains data and develops reports for budget purposes.
4. Performs clerical/technical/financial case management, applying advanced knowledge of administrative, legal, financial and/or program-related requirements; researches, reviews, and resolves complex case issues; determines, maintains and tracks case information and status; identifies needed documents and/or actions; contacts and meets with clients, victims, parolees, patients and others to obtain forms/documents, arrange payments/services and help them meet obligations; may advocate on behalf of clients within limits of authority; coordinates case activities with managers, professional staff, and/or other work units as appropriate.
5. Prepares a variety of difficult reports and documents requiring advanced knowledge of specialized subject matter including, but not limited to court orders, petitions, subpoenas, insurance claims, treatment authorization forms; reviews complex legal, custody, health care and other records to identify needed information; applies complex codes and requirements for reimbursement and other purposes.
6. May perform secretarial duties for various staff including supervisors and/or professional staff; may supervise a very small number of clerical workers as an incidental duty; may train or review the work of others; may serve as a lead worker over a large group of office clerical/technical staff.

MINIMUM QUALIFICATIONS:

(Special Note: For positions reclassified to this class as part of Classification Studies #01-18 and #02-08, the incumbents occupying those positions on the effective date that the study is implemented by the Board of Supervisors shall be deemed to meet the minimum qualifications for the class.)

Either I

Experience: One year of work at a level equal to or higher than Senior Office Assistant in San Joaquin County service.

Or II

Experience: Three years of general clerical, secretarial and/or office technical work,

including at least one year functioning at a full-journey level.

Substitutions: a) One year of business training in an approved vocational training program may substitute for one year of the above-required experience; or b) Completion of 30 semester/45 quarter credit units at an accredited college or university may substitute for one year of the above-required experience.

And

Certificates: If required by the nature of the assignment: 1) possession of an acceptable typing/keyboarding or other certification of ability to input data at the rate of 45 words per minute; and/or 2) possession of an acceptable proficiency certificate in one or more computer software programs.

Special Requirement: Most positions require the ability to use computers and/or word processing equipment. If required by the nature of the assignment, demonstrated general or software-specific computer proficiency may be required prior to appointment.

Knowledge of: Advanced office practices and procedures; standard clerical accounting methods and practices; principles of planning and organizing work; methods of researching, gathering, organizing and reporting data; personal computer systems and general office computer software; public relations techniques; advanced interviewing techniques; advanced filing and record keeping systems; complex correspondence and report formats; arithmetical operations related to advanced clerical/technical/financial processes; basic principles of training and supervision; advanced cash handling procedures.

Ability to: Research, interpret and apply complex laws/regulations, court orders, program policies/procedures, and third-party rules/requirements related to specialized clerical activities; evaluate and establish priorities; gather, organize, input and maintain complex information, including financial or program-specific data; provide/obtain detailed information to/from others, even in difficult situations; utilize advanced office procedures and equipment; follow complex oral and written procedures and directions; establish and maintain effective working relationships with others; communicate effectively with others; write clearly and legibly; perform advanced arithmetical operations; lead or supervise others.

Physical/Mental Requirements: Mobility—frequent operation of a data entry device, repetitive motion, sitting for long periods, walking; occasional standing, pushing, pulling, bending, squatting, climbing; Lifting—frequently 5 pounds or less; occasionally 5 to 30 pounds; Visual—constant good overall vision and reading/close-up work; frequent color perception and use of eye/hand coordination; occasional use of depth perception and peripheral vision; Hearing/Talking—frequent hearing of normal speech, hearing/talking on the telephone, talking in person; Emotional/Psychological—frequent decision making, concentration, and public contact; Special Requirements--some assignments may require working weekends, nights, and/or occasional overtime; Environmental—occasional exposure to varied weather conditions.