



**MARCH 2019**  
**FLSA: NON-EXEMPT**  
**Bargaining Unit: GE/CO**  
**JCN: 2104**

## **SR. OFFICE ASSISTANT**

### **DEFINITION**

Under general supervision, performs advanced and specialized clerical work of above average difficulty and complexity in areas such as legal documents, personnel functions, insurance claims, contracts, proposals, treatment authorization forms, and program eligibility forms; may serve as a lead worker over a group of office support staff; and performs related duties as assigned.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from assigned supervisory or management personnel. Exercises no direct supervision over staff but may serve as a lead worker by providing technical and functional direction to subordinate Office Assistants and other administrative support staff.

### **CLASS CHARACTERISTICS**

This is the advanced-level classification in the Office Assistant series. Positions in this class must meet specific criteria for allocation to this class and are not flexibly allocated with other classes in the series. Incumbents perform difficult and specialized clerical duties and/or may serve as a lead worker with responsibility for assigning, prioritizing, guiding, and monitoring the work of subordinate clerical staff. Incumbents are expected to apply above-average initiative and independent judgment to perform and coordinate specialized office procedures that are unique to an assigned department and typically require some knowledge, interpretation, and/or explanation of program policies and procedures. Typical assignments may include, but are not limited to: serving as a lead worker over a small group of office support staff; providing clerical case management support services; preparing and processing legal documents, and coordinating legal-clerical activities in a non-attorney office setting; providing clerical support to human resources functions, facilitating processes that require extensive coordination and communication; performing clerical accounting, billing, or collections work; and preparing complex documents that require specialized formatting and advanced technology skills.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

- May provide lead direction and training to a small group of office support staff; organizes, assigns, and monitors subordinates' work; sets priorities and provides guidance and training based on established policies and procedures; follows up to ensure appropriate completion of assigned work.
- May provide input into employee performance, selection and other personnel decisions.
- Performs advanced and specialized office support work which typically requires some specialized subject matter knowledge, including interpretation and/or explanation of program policies and procedures as well as coordination of detailed or specialized office activities related to the department to which assigned.
- Provides specialized department information, including detailed program-specific information, to County executives, managers, clients, outside agencies, and others; searches for, receives, and explains complex rules, regulations, policies, procedures, and technical office operations; explains external laws, regulations, ordinances, and policies as they relate to clerical/technical/office functions.
- Assists clients in completing complex forms for the purpose of documenting specialized program-related information; provides advanced customer service in a calm, helpful, and effective manner.
- Researches, compiles, maintains, and processes statistical, financial, and/or other numerical data to

support specialized office functions; creates spreadsheets, logs, and other clerical tools to assist with maintaining information.

- Performs the more difficult and specialized clerical tasks related to personnel, payroll, budgetary, purchasing, inventory, and other departmental administrative functions; completes special tasks and projects that require substantial independent judgment and time management.
- Maintains routine accounts payable/receivable and billing records, applying knowledge of specialized program requirements; maintains standard ledgers and account records; enters data into worksheets; matches invoices with orders, reviewing and verifying for completeness, accuracy, and consistency; computes, collects, and receipts monies and fees, including large sums; performs routine account adjustments within limits of authority; compiles information and prepares reports for budget purposes.
- Performs routine clerical case management duties, applying advanced knowledge of administrative, legal, financial, and/or program-related requirements; researches, reviews, and resolves complex documentation problems; determines, maintains, and tracks case information and status; identifies needed documents and proactively takes required actions; contacts and meets with clients, victims, parolees, and others to obtain forms/documents, arranges payments/services, and otherwise helps them meet obligations; coordinates case administrative activities with managers, professional staff, and/or other work units as appropriate.
- Performs a variety of clerical medical records duties, provides for intake and registration of patients; interviews patients to obtain medical information and appropriate documentation required to open patient charts; transcribes patient information histories, physical examination notes, and related patient medical information containing specialized medical terminology; and reviews financial and insurance status of patient; explains treatment costs and methods of payment; performs periodic re-evaluations, re-determinations, and adjustments as necessary.
- Reads and processes various legal documents such as court calendars, court orders, booking slips, probation reports, police reports, criminal records, petitions, proofs of service, arrest warrants, and other legal information; verifies, codes, edits, enters, and retrieves legal data; may access or have access to confidential statewide data files.
- Receives, reviews, and imports legal documents, arrest, citations, or incident records, probation reports, files, and cases to identify inaccurate, inconsistent and unclear codes, data, and other information; notifies and assigns to the appropriate staff member; may participate in resolving problem situations related to various legal documents received;
- Checks court and legal documents for proper authorization, obtains missing signatures, and prepares court files; processes, maintains, and distributes case discovery.
- Designs, formats, edits, and creates documents requiring difficult layouts and the use of specialized technology; creates departmental booklets, flyers, and websites.
- Compiles complex materials for meetings; prepares agendas and attends meetings to take summary notes as required.
- Maintains records, and processes various forms, applications, permits, or other documents specific to the department or division unit.
- Types correspondence, reports, forms, and specialized documents related to the functions of the organizational unit to which assigned from drafts, notes, dictated recordings, or brief instructions, using a typewriter or word processor; may draft various documents based on brief instructions; proofreads and checks material for accuracy, completeness, and compliance with departmental policies; verifies correct English usage, including grammar, punctuation, and spelling.
- Performs other routine clerical support work as required, which may include, but is not limited to, receiving and screening visitors and checking them in for appointments; copying documents; typing correspondence, reports, forms, and specialized documents; filing/retrieving files; processing mail; faxing information; screening telephone calls and taking messages; collating documents; maintaining lists and logs; scanning/imaging/indexing documents; opening and distributing mail; processing outgoing mail; ordering and maintaining inventory of supplies and forms, etc..
- Attends various meetings and trainings as required or appropriate.
- Performs related duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Basic principles of personnel leadership and training.
- Methods of planning and organizing work for oneself and others.
- Advanced clerical practices and procedures applicable to the assigned department.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to the assigned area of responsibility.
- General County and assigned department programs, goals, policies, and procedures.
- Advanced clerical methods of researching, gathering, organizing, and reporting data.
- Advanced business letter writing and formatting of typed materials.
- The types of records, reports, forms, and other documents unique to the assigned department or program.
- Advanced clerical interviewing and customer service techniques.
- Advanced cash handling procedures.
- Standard legal or medical documents, forms, and terminology if required by assignment.
- Business arithmetic, including percentages and decimals.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, victims, witnesses, and County staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

### **Ability to:**

- Assign, direct, train, and monitor the work of others.
- Evaluate and establish priorities for self and others.
- Perform detailed and difficult office support work accurately and efficiently.
- Perform specialized processes, procedures, and office support tasks related to the assigned department.
- Read, comprehend a variety of specialized documents related to the assigned department.
- Understand and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Research and explain laws/regulations, court orders, program policies/procedures and third-party rules/requirements related to specialized department activities.
- Gather, organize, input and maintain complex information, including financial or program-specific data.
- Provide/obtain detailed information to/from others, including in difficult situations.
- Organize and maintain accurate files and records.
- Type accurately at speeds necessary for successful job performance.
- Make difficult and accurate arithmetic calculations.
- Utilize advanced office procedures and equipment to complete assignments.
- Operate, adjust, utilize, and perform minor maintenance to imaging scanners and personal computers, photo reproduction, microfilming, and various micro imaging equipment.
- Verify scanned images.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Deal tactfully and effectively with persons contacted in the course of work, including those of diverse

- socioeconomic and cultural backgrounds.
- Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.*

Equivalent to graduation from high school;

AND

Two (2) years of general clerical or office support experience, including at least one (1) year at a level equivalent to the County's class of Office Assistant II. Depending on assignment, previous knowledge and experience in the assigned area is desirable.

**Licenses and Certifications:**

- None.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various County and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds. Reasonable accommodations will be made for individuals on a case-by-case basis.

**ENVIRONMENTAL CONDITIONS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Depending on the area assigned, employees may interact with members of the public under emotionally stressful conditions.

**WORKING CONDITIONS**

If assigned to a Law and Justice Department, incumbents must pass a thorough background investigation.