



OFFICE SPECIALIST

Classification specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications *may not include all* duties performed by individuals within a classification. In addition, specifications are intended to outline the *minimum* qualifications necessary for entry into the class and do not necessarily convey the qualifications of incumbents within the position.

FLSA STATUS: Non-Exempt

DEFINITION:

Under direction, provides difficult, complex, and specialized administrative support to assigned departmental projects and programs; develops, summarizes, and maintains administrative and financial records; types, edits, processes, distributes, and files a variety of documents; enters data and information into various databases and computer systems; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED:

Receives direction from assigned supervisory or management personnel. Exercises no direct supervision over staff.

DISTINGUISHING CHARACTERISTICS:

This journey level classification is responsible for performing the full range of specialized administrative duties in an assigned department or program, working independently, and exercising judgment and initiative. Incumbents perform more complex work supporting programs or functions where more in-depth and specialized knowledge of the department is needed. Positions at this level receive occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

EXAMPLES OF ESSENTIAL DUTIES: Essential duties include, but are not limited to, the following:

- Performs technical and procedural work in support for an assigned department, division, or program; applies technical procedures, methods, and techniques to support program and functions and processes; monitors and explains operational and program requirements and processes to various stakeholders.
- Provides information to the public or Authority Staff that requires the use of independent judgment, compliance with laws and interpretation of policies, rules and procedures.
- Greets and provides general information to clients, visitors, vendors, and staff, in person and on the telephone, in a professional manner; schedules appointments and meetings, and maintains calendars; assists clients by referring them to applicable sources of information;

distributes applications and forms, and explains how to complete them; answers requests for information by consulting various available sources.

- Verifies and reviews calculations, forms, data, and reports for accuracy, completeness, and conformance with established Authority regulations and procedures.
- Types, formats, edits, revises, proofreads, tracks, and prints a variety of narrative, statistical, and technical documents, reports, correspondence, spreadsheets, and other documents and materials.
- Inputs, updates, tracks, and extracts information into appropriate databases and billing systems; searches records and files for data.
- Collects and maintains client financial information/fees and related documents; enters data into billing and other systems; keeps all client financial information updated.
- Assists administrative and clinical staff with preparing, processing, and uploading documents; provides administrative support to other Authority program areas as assigned.
- Performs other clerical/administrative work as required, which may include, but is not limited to, typing and copying documents, scanning, filing/retrieving files, reviewing and processing mail, faxing information, maintaining inventory of supplies and materials, and related work.
- Observes and complies with all Authority and mandated safety rules, regulations, and protocols.
- Performs other duties as assigned.

QUALIFICATIONS:

Any combination of education, training, and experience that provides the required knowledge, skills, and abilities to perform the essential duties of the position is qualifying. The incumbents will possess the most desirable combination of education, training, skills, and experience, as demonstrated in their past and current employment history. A typical example includes:

Education and Experience

Education:

- Equivalent to completion of the twelfth (12th) grade.

Experience

- Three (3) years of increasingly responsible clerical and administrative support experience.

Knowledge of:

- General office and business administrative operations and practices.
- Basic principles and techniques of research and data collection.
- Business mathematics.
- Medical terminology related to administrative support for clinical staff and clients.

- Methods and techniques of compiling and assembling data and documents.
- Principles, practices, methods, and techniques of business correspondence and report writing.
- Principles and procedures of record keeping, document processing, and filing systems.
- Authority and department programs, goals, and policies and procedures of the assigned department/division.
- Applicable federal, state, and local laws, codes, and regulations as well as industry standards and best practices pertinent to the assigned area of responsibility, including the Health Insurance Portability and Accountability Act (HIPAA).
- Authority and mandated safety rules, regulations, and protocols.
- Techniques for providing a high level of customer service, interacting and effectively dealing with the public, community based organizations and service providers, stakeholders, and Authority 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, including computers and software programs relevant to work performed.

Ability to:

- Perform varied office and customer service support work, requiring the use of independent judgment and discretion, with accuracy and speed.
- Make accurate mathematical computations.
- Learn the procedures and regulations governing the area of assignment and the terminology and documents used.
- Demonstrate responsibility when handling sensitive matters or confidential documents; maintain the confidentiality of client information.
- Prepare clear and concise reports, correspondence and other written materials.
- Process and track specialized department documents.
- Maintain comprehensive files and records.
- Understand scope of authority in making independent decisions.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with clients, their families, Authority staff, and the behavioral health community.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.

PHYSICAL DEMANDS (ADA)

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas 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 10 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may also interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

In accordance with California Government Code Section 3100, Tri-City Mental Health Center employees, in the event of a disaster, are considered disaster service workers and may be asked to protect the health, safety, lives, and property of the people of the State.

Receive satisfactory results from a background investigation, which includes fingerprinting; a pre-employment physical examination, which includes a drug/alcohol test; and an administrative review.