



## Office Assistant I/II

Class Code:  
213, 214

### DEFINITION

Under supervision (Office Assistant I) or general supervision (Office Assistant II) from the Office Supervisor or a designated management representative, performs varied and responsible clerical and office support duties to support District functions, types and proofreads a variety of correspondence, reports, forms, and specialized documents from drafts, notes, and/or brief instructions; organizes, oversees, and maintains a variety of technical and office records and files; provides and receives factual information from the public and others contacted in the course of work; may direct the work of part-time or temporary assistants on specific projects; and performs related work as required.

This is a broad classification with individual positions assigned to specific functional areas. The duties outlined below are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

### DISTINGUISHING CHARACTERISTICS

**Office Assistant I** is the entry-level class in the Office Assistant series. Under close to general supervision, within a framework of established policies and procedures, incumbents initially perform basic clerical duties while learning departmental and District procedures. As experience and proficiency are gained, assignments become more varied and complex. Assignments are given in specific terms and are subject to frequent review while in progress and upon completion by assigned supervisor. There is limited latitude for independent judgment and action in well-defined areas of work.

This classification is distinguished from the experienced, journey-level Office Assistant II class by the routine nature and limited complexity of work assignments and the level of supervision received. The Office Assistant I and II classifications are flexibly staffed. Upon recommendation of the immediate supervisor and approval by the department manager, incumbents in this classification may advance to the Office Assistant II after two (2) years at the first level and demonstrated proficiency to meet the job requirements of the Office Assistant II classification.

**Office Assistant II** is the experienced, journey-level class in the Office Assistant series. Under general supervision, within a framework of established policies and procedures, incumbents are fully competent, with a high level of accuracy, to perform a variety of office support duties, which often involve technical concepts and department-specific terminology. Assignments are given in general terms and are subject to periodic review while in progress and upon completion by assigned supervisor. There is some latitude for independent judgment and action in well-defined areas of work.

This classification is distinguished from the entry-level Office Assistant I by the increased complexity of work assignments and level of independence with which assignments are performed. This class is further distinguished from the advanced working level Office Assistant III classification which independently works in coordination with professional staff requiring detailed knowledge of technical work processes and terminology.

## **TYPICAL DUTIES**

### **TYPICAL EXAMPLES OF DUTIES MAY INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING:**

- Prepares correspondence, reports, forms, construction specifications, agreements, and/or specialized documents from drafts, notes, or brief instructions, using standard office equipment such as a personal computer and word-processing, spreadsheet, and database software applications.
- Proofreads documents for accuracy, completeness, format, compliance with departmental policies, and correct English usage including grammar, punctuation, and spelling; returns document to originator if content or major format revisions are required.
- Maintains inventory for goods and supplies, places orders online, receives goods and supplies, submits invoices for approval, and releases invoices for payment in the financial system.
- Modifies and develops office procedures and practices to standardize processes.
- Uses a personal computer to enter and retrieve data using standard office applications such as MS Word, Excel, Access, or specialized applications depending on assigned organizational unit.
- Provides various office and organizational support to professional staff, including monitoring and maintaining workflows, advising of upcoming deadlines, and coordinating and organizing meetings.
- Maintains a variety of technical and office files in alphabetical, numerical, or coded format; scans and validates electronic files in document libraries and document management systems; develops and maintains document management and intranet sites; assists with purging records and files; and researches and responds to Public Records Act and other record requests from the public and technical and managerial staff.
- Prepares and updates a variety of reports, which may require research from several sources and use of arithmetic calculations.
- Maintains a variety of records, and processes various forms such as personnel forms, purchase requisitions, and other forms specific to assigned organizational unit.
- Requests pricing from vendors and assists organizational staff with the use of the District's financial system.
- Provides and requests factual information regarding District activities and functions; may assist customers and other members of the public.
- Receives and compiles technical information from engineers and others and incorporates into construction specifications and other bid documents; types, prints, advertises, and distributes completed documents; receives and manages bids and proposals, and issues and posts bid summaries and results; after approval, processes contractor progress payments per construction contracts.

- Organizes and oversees project files and a variety of other technical and office files; files and retrieves information, purges obsolete documents, and combines files as appropriate; assists in identifying files for off-site storage.
- Receives and responds to calls from developers, contractors, homeowners, and the general public; provides factual information which may require interpretation of policies and procedures; investigates and resolves customer service issues.
- Operates standard office equipment and may provide relief for other District office support staff.
- Completes special projects as assigned; researches and compiles information as necessary.
- May review/audit information in the District's financial system related to the District's credit card program.
- May collect timecards from supervisors in assigned department and enters information into the payroll system; follows up with staff to clarify information and to reconcile employee work hours.
- May issue security badges, cyber keys, equipment, and keys to departmental employees and collect upon separation.
- May respond to emergency and non-emergency maintenance calls, and dispatch and coordinate resources for field staff.
- May calculate and issue deposit requests, and receive, track, and manage customer and developer payments for a variety of fees and charges.
- May coordinate, manage, and track a variety of regulatory filings, notices and reports.
- May train and direct the work of part-time or temporary workers on specific projects.
- Serves on various task forces and committees.
- Performs other related work as required.

## **REQUIREMENTS**

*Any combination of education and experience that would likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be the equivalent of:*

### **Education and Experience:**

Possession of a high school diploma or its equivalent; and

**Office Assistant I:** One (1) year of general office support work, which includes training or experience using a personal computer and standard word processing, spreadsheet, and database software applications.

**Office Assistant II:** Two (2) years of general clerical or office assistant experience equivalent to that of an Office Assistant I within the District.

**Knowledge, Skills, and Abilities:**

Knowledge of: proper written and spoken English, including spelling, punctuation, and grammar; modern office practices, methods, and computer equipment and applications related to the work, including word processing, database, and spreadsheet software.

Skill and Ability to: rapidly learn the specific procedures and technical terminology of the organizational unit to which assigned; understand and carry out oral and written directions; multitask; maintain discretion; maintain accurate records and files; make accurate arithmetic calculations; perform detailed clerical work with accuracy; type accurately at a rate of 45 words per minute from printed copy; perform the essential duties of the job without causing harm to self or others; operate modern office equipment including computer equipment and specialized software applications programs; communicate clearly and concisely, both orally and in writing; establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Office Assistant II: *(In addition to the above)*

Knowledge of: principles and practices of business letter writing and standard formats for typed materials; policies and procedures related to the department to which assigned; business data processing principles, and standard to advanced uses of word processing software applications; records management and filing practices and procedures; terminology and technical work processes related to the department to which assigned.

Skill and Ability to: organize and maintain varied and complex files; compose routine correspondence from brief instructions; work independently and exercise sound judgment within established guidelines; use specific technical terminology of the organizational unit to which assigned; effectively operate a personal computer, calculator, two-way radio and other standard office equipment; learn to proficiently utilize specialized software applications to support the work of the assigned organizational unit; organize and prioritize work activities and meet established deadlines; communicate tactfully and effectively with customers and the public.

**Additional Requirements:**

- Must possess a valid California driver's license and have a satisfactory driving record.

**Working Conditions/Physical Requirements:**

The essential functions of these classifications are performed in a controlled-temperature office and require the ability to: sit for extended periods of time in front of a computer screen; use finger dexterity and hand strength to perform simple grasping and fine manipulation; use a telephone, computer keyboard and other office equipment on a daily basis; speak and hear in person and on the phone; see sufficiently to perform assignments; intermittently twist to reach equipment or supplies surrounding desk; and lift and/or carry items weighing up to 20 pounds.

Revised: 06/15, 11/21

Approved: \_\_\_\_\_

Human Resources/Risk Manager