

**City of San José**  
**CLASS SPECIFICATION**

**Title: Senior Office Specialist FT/PT (1135/1137)**

<b>DEPARTMENT</b>	<b>ACCOUNTABLE TO</b>	<b>FLSA STATUS</b>
Varies	Varies	Non-exempt

**CLASS SUMMARY**

Under general supervision, performs a variety of office clerical tasks, including customer service duties in a major call center or major customer service function; provides customer service duties requiring knowledge of organization and applicable procedures, laws, rules, and regulations; customers may be employees, the public, or other departments. Assembles and verifies data and information in complex reports, records and databases. May act as a lead to lower level clerical staff. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

The class of Senior Office Specialist is the third level in the Office Administration series, performing advanced level clerical tasks within a specialized functional area, requiring knowledge of the organization and applicable procedures, laws, rules, and regulations. Incumbents in Senior Office Specialist class may also lead the work of lower level staff. This class differs from Office Specialist II in that an incumbent of the latter class performs more routine work under closer supervision. This classification differs from the Principal Office Specialist in that incumbents of the latter class perform work of greater scope, may perform as an individual contributor with a high level of expertise in a major program, or may lead a clerical function that includes Senior Office Specialist staff.

**QUALIFICATIONS**

**(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)**

**Minimum Qualifications**

**Education and Experience**

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND two (2) years of experience in varied office clerical work.

**Other Qualifications**

**(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)**

**Basic Competencies**

**(Needed at entry into the job in order to perform the essential duties.)**

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills; displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.

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- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Customer Service – Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- Decision Making - Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Flexibility – Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- Multi-Tasking – Can handle multiple projects and responsibilities simultaneously; has handled a wide variety of assignments in past and/or current position(s).
- Reliability - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

DUTY NO.	<b>TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b>	FREQUENCY*
1.	Provides customer service duties requiring knowledge of organization and applicable procedures, laws, rules, and regulations. Customers may be employees, the public, or other departments. Receives and responds to complaints and questions by determining the issue and researching and providing information independently. As needed, refers individuals to the appropriate staff member for resolution. Distributes a variety of information and written materials; helps the public fill out a variety of forms.	Daily/Several Times
2.	Answers and screens telephone calls; answers questions and provides a variety of information over the telephone that requires knowledge of the organization, applicable, procedures, laws, rules, and regulations; takes messages and refers telephone calls to appropriate person.	Daily/Several Times
3.	Performs radio/telephone dispatcher duties, transmitting and receiving information, and dispatching workers.	Daily/Several Times
4.	Performs data entry and types documents, including utilization of word processing, spreadsheets, database systems, presentation software and other software; reviews documents for accuracy; may also review for content.	Daily/Several Times
5.	Sets up complex filing systems and procedures, including retention control procedures and automated recordkeeping systems; maintains and updates files, forms, records, inventories and documents, including personnel files and complex files such as those of a legal or technical nature; updates logs and tracking systems; retrieves records and documents as requested; sets up and administers appointments for file reviews.	Daily/Several Times
6.	Operates and utilizes a variety of standard office equipment, including but not limited to computers, printers, scanners, phones, calculators, fax, software programs, and accounting machines and equipment.	Daily/Several Times
7.	Orders, maintains and issues supplies.	Daily/Several Times

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8.	Assembles and verifies data and information in complex reports (such as financial or statistical reports and contractual agreements), records and databases; gathers information and data from other sources such as other departments, or outside agencies; independently prepares summaries, tabulations, or reports of data and information.	Daily
9.	Independently codes items for posting, entering or listing; makes arithmetical calculations; maintains diversified records, including employee time and assignment records; prepares and distributes a variety of documents with legal implications and deadlines.	Daily
10.	Independently prepares and drafts basic memorandums, meeting notes and other documents; answers correspondence, prepares summaries of records, minutes, and other documents without destroying the meaning; compares a variety of documents such as purchase orders, receiving clips and others to check for arithmetical accuracy and general completeness.	Daily
11.	Opens, reads, sorts, and distributes mail.	Daily
12.	Administers the bilingual pay program by maintaining the data of bilingual certified employees through PeopleSoft and responding to bilingual certification questions. Notifies Payroll of bilingual setup.	Weekly
13.	May receive cash payments and make change; proves and balances cash receipts.	Intermittent
14.	May act as a lead, assigning, scheduling and checking work, providing technical direction, determining priorities, and training staff. As a lead, may review and sign timecards and may give input to the supervisor regarding hiring, promotion, termination and discipline of employees. May collect, organize and maintain confidential records such as employee performance appraisals.	Intermittent
15.	Prepares in-house exam booklets and exam box; proctors and scores exams; monitors key reviews for exams; archives exam related materials.	Intermittent
16.	Transmits electronic data interchange of benefits interfaces. Coordinates processes and transmits electronic data interfaces between the City and its providers. Uploads payroll interfaces into the payroll system. Provides reports to staff.	Intermittent
17.	Performs related duties as required.	As Required

\*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

### **PHYSICAL/ENVIRONMENTAL ELEMENTS**

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;

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- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

**CLASSIFICATION HISTORY** *Created 3/80, Rev. 8/84, Rev. & Ret. 11/96 (formerly Senior Clerk Typist), Rev. 1/01, Rev. 09/01, Rev. 08/18; s005*