

City of San José
CLASS SPECIFICATION

Title: Office Specialist I/II FT/PT (1126/1128/1130/1133)

DEPARTMENT	ACCOUNTABLE TO	FLSA STATUS
Varies	Varies	Non-exempt

CLASS SUMMARY

Under immediate (Office Specialist I) to general supervision (Office Specialist II), performs a variety of office clerical tasks, following detailed written or oral instructions and established procedures. Provides customer service, including acting as a receptionist; refers individuals to the appropriate staff member, gives out a variety of information and written materials. Performs data entry and types documents, using word processing, spreadsheets, database systems, presentation software and other software. Performs related work as required.

DISTINGUISHING CHARACTERISTICS

The Office Specialist I/II is the flexibly staffed entry/journey class in the Office Administration series, described as follows:

Office Specialist I – This is the entry level class in the Office Specialist classification series responsible for providing routine clerical support within an assigned department, division, or program. Positions at this level are governed by established procedures that need to be learned, are not expected to function with the same amount of knowledge or skill level as positions allocated to the Office Specialist II level, and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

Office Specialist II – This is the journey-level class in the Office Specialist classification series, wherein incumbents have learned the established procedures, and are responsible for performing the full range of clerical duties within an assigned department, division, or program. Incumbents are expected to work independently and exercise judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Senior Office Specialist that the latter performs more complex work requiring knowledge of the organization, and applicable procedures, laws, rules and regulations; positions at the Senior Office Specialist level may serve as a lead worker over lower level clerical 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

Office Specialist I

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate).

Office Specialist II

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND one (1) year of experience in office clerical work.

Acceptable Substitution

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A bachelor's degree from an accredited college or university may be substituted for the required experience.

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.
- 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.
- 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.	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:	FREQUENCY*
1.	Provides customer service, including acting as a receptionist; refers individuals to the appropriate staff member; gives out a variety of information and written materials; customers may be employees, the public or other departments; helps the public fill out standard forms, responds to complaints by providing information or ensuring that individuals are properly referred to someone who can assist them.	Daily/Several Times

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DUTY NO.	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:	FREQUENCY*
2.	Answers telephone calls, takes messages, and refers telephone calls to appropriate person; answers questions and provides a variety of information over the telephone.	Daily/Several Times
3.	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
4.	Opens, sorts, and distributes mail.	Daily/Several Times
5.	Performs data entry and types documents, including utilization of word processing, spreadsheets, database systems, presentation and types of software; reviews documents for accuracy.	Daily/Several Times
6.	Processes and submits meeting requests, responds to requests as necessary, utilizing multiple software tools.	Daily/Several Times
7.	Assembles and verifies data and information in reports, records and databases; gathers basic information and data from other sources such as other departments, or outside agencies; prepares summaries, tabulations, or reports of data and information.	Daily
8.	Sets up basic filing systems and procedures; maintains and updates files, forms, records, inventories and documents, including complex files such as those of a legal or technical nature; updates logs and tracking systems; retrieves records and documents as requested.	Daily
9.	Codes items for posting, entering or listing; enters billing agreements and data into the financial management system; makes arithmetical calculations; maintains diversified records, including employee time and assignment records.	Daily
10.	Orders, maintains and issues supplies.	Daily
11.	Receives cash payments and makes change; proves and balances cash receipts; pays invoices; takes checks to the cashier.	Daily
12.	May assist in the training of less experienced workers.	Intermittent
13.	Prepares and drafts basic memoranda, correspondence, meeting notes and related forms, records or documents; compares a variety of documents such as purchase orders, receiving clips and others to check for arithmetical accuracy and general completeness.	Intermittent
14.	Performs other 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. 10/80, Rev. & Ret. 11/96 (formerly Typist Clerk I), Rev. 09/01, 08/18, 02/21; s005*