

Department of Consumer Affairs
Position Duty Statement
 HR-041 (new 7/2015)

Classification Title Office Assistant (General)	Board/Bureau/Division California Board of Accountancy
Working Title Examination Assistant	Office/Unit/Section / Geographic Location Examination Unit
Position Number 615-330-1441-003	Name and Effective Date

General Statement: Under the close supervision of the Staff Services Manager I, the Office Assistant (General) is responsible for completing the less complex office support and customer service functions of the Examination Unit within the California Board of Accountancy (CBA). Duties include, but are not limited to, the following:

A. Specific Assignments [with Essential (E) and Marginal (M) Functions]

30% (E) Examination Unit Support

- Collates examination information and application packets, prepares address labels, and mail packets.
- Answers telephone calls for the Examination unit. Receives and responds to requests for examination applications and general information. Takes messages for exam staff and/or responds to simple inquiries.

30% (E) Transcript and Examination Application Intake

- Opens, logs, files, and/or distributes college/university transcripts to the Examination and Licensing units.
- Opens and processes examination applications. Pulls files for repeat sitters and makes new files for first time sitters.

30% (E) Licensing Division Support

- Acts as a back up to reception. Answers calls, takes and distributes phone messages, greets and assists visitors to the CBA, accepts and distributes documents received at the reception counter.
- Organizes and maintains filing system for the Examination, Initial Licensing, and Renewal and Continuing Competency Unit. Pulls and boxes records to be archived, creates lists of archived box contents, and works with Administration Unit staff to create transfer lists for archiving.
- Provides support in division special projects by reviewing documents, opening and sorting documents or mail, pulling records, filing, electronically logging data using Microsoft and/or Adobe products, and other duties as needed.

10% (M) Performs Other Job-Related Duties as Required

B. Supervision Received

Although under the close supervision of the Staff Services Manager I, the Office Assistant (General) receives direct guidance from the Examination Analysts.

C. Supervision Exercised

Not applicable to this position.

D. Administrative Responsibility

Not applicable to this position.

E. Personal Contacts

The Office Assistant (General) has contact with examination candidates and staff on a regular basis. The Office Assistant (General) will assist in responding to a high volume of inquiries/requests for information regarding examination requirements, educational qualifications, file status, etc.

F. Actions and Consequences

The supervision of the Staff Services Manager I and guidance of the Examination Analysts will minimize the level of impact the Office Assistant (General) will have on the examination candidates. However, failure to provide the required assistance in opening and sorting incoming examination applications and responding to general inquires would result in the need to redirect other staff to the Examination Unit.

G. Functional Requirements

No specific physical requirements are present: the incumbent works 40 hours per week in an office setting, with artificial light and temperature control. Daily access to and use of a personal computer and telephone is essential. Sitting and standing requirements are consistent with office work.

H. Other Information

The Office Assistant (General) must possess good communication skills and be able to work efficiently and cooperatively with others and demonstrate consistent attendance. This position has access to confidential or sensitive information related to consumers of CBA services and/or employees of the CBA. The individual occupying this position is expected to maintain the privacy and confidentiality of such information at all times.

In all job functions, employees are responsible for creating an inclusive, safe, and secure work environment that values diverse cultures, perspectives, and experiences, and is free from discrimination. Employees are expected to provide all members of the public equitable services and treatment, collaborate with underserved communities and tribal governments, and work toward improving outcomes for all Californians.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health and Safety Analyst.)

Employee Signature

Date

Office Assistant (G)

Printed Name, Classification

