

## Department of Consumer Affairs

### Position Duty Statement

HR-041 (new 07/2015)

<b>Classification Title</b>	<b>Board/Bureau/Division</b>
Office Technician (General)	California Board of Occupational Therapy
<b>Working Title</b>	<b>Office/Unit/Section / Geographic Location</b>
Revenue Recovery and Cashier Technician	Licensing and Administration Unit / Sacramento
<b>Position Number</b>	<b>Effective Date</b>
647-110-1138-009	

General Statement: Under the general direction of the California Board of Occupational Therapy (Board), Licensing and Administration Unit (LAU) Manager, Supervisor I, the Office Technician (General) [OT (G)] performs cashiering and administrative support duties for the Supervisor I, Executive Officer (EO), and Board. Duties include, but are not limited to, the following:

#### A. SPECIFIC ACTIVITIES [Essential (E) / Marginal (M) Functions]

##### **50% Citation and Cost Recovery (E)**

- Track, generate, prepare and issue three demand for payment letters per citation. (20%)
- Coordinate and calendar every citation and fine that has not been satisfied by its due date. (10%)
- Collaborate with the Enforcement analyst on outstanding abatement orders. (5%)
- Create and maintain Excel tracking logs for citation and cost recovery payments and update status of payments in BreEZe. (5%)
- Record all depositing monies through the Department of Consumer Affairs' cashiering unit. (5%)
- Notify the Franchise Tax Board (FTB) Intercept program when licensee fails to comply with citation order. Send request to FTB Intercept Program to delete record once satisfied at Board level. Monitor FTB Outstanding accounts report. (5%)

##### **35% Cashiering (E)**

- Cashier initial licensing fees, license renewal fees, verification fees, duplicate license request fees, fingerprint processing fees, Create and maintain an Excel log for record keeping and depositing monies through the Department of Consumer Affairs' cashiering unit.
- Research duplicate payments; initiate refund requests, if applicable. Post and file refund information in Revenue Reports and in the licensees' files.
- Process and follow-up on dishonored checks.
- Maintain tracking logs for refunded items and cashiering batch reports received.
- Review exception reports for license holds due to inadequate continuing competency and conviction renewal statements.

##### **10% Administrative Support Duties (E)**

Act as back-up receptionist for the Board's public counter. Answers and responds to technical calls regarding policies, procedures, general licensure requirements, licensure renewal, continuing competency questions. Respond to email inquiries on

various topics from licenses, members of the public and stakeholders sent to the Board's primary email account.

**5 % Other Duties (E)**

Perform other work related duties as assigned, to support the Board's mission and goals.

B. Supervision Received

The OT (G) is under the general direction and receives the majority of assignments from the LAU Manager, Supervisor I ; however, direction and assignments may also come from the EO and other Board staff.

C. Supervision Exercised

None

D. Administrative Responsibility

None

E. Personal Contacts

The OT (G) has frequent contact with the public, including applicants, licensees, and employers, and continuous contact with all Board staff. In addition, the incumbent will have occasional contact with DCA General Ledger Unit and Business Services Office staff.

F. Actions and Consequences

Failure to implement and maintain effective procedures and practices could result in the day-to-day operations of the office being disrupted and the Board not effectively and efficiently serving their stakeholders.

G. Functional Requirements

The incumbent works up to 40 hours per week in an office setting, with artificial light and temperature control. The ability to use a personal computer and telephone is essential. The incumbent must be able to remain in a stationary position approximately 70% of the time and is required to frequently communicate with applicants, colleagues, licensees, and stakeholders in a professional manner by way of phone, e-mail, and other forms of correspondence. The position requires positioning oneself to retrieve files and occasional light lifting, up to 20 lbs.

H. Other Information

Regular and consistent attendance is required. Incumbent is expected to possess good communication and organizational skills, be punctual, dependable, use good judgment in decision-making, exercise creativity and flexibility in problem identification and resolution, and manage time and resources effectively. In addition, the incumbent must portray a professional demeanor at all times. This position has access to confidential or sensitive information; privacy and confidentiality of such information is expected 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.

Criminal Offender Record Information (CORI)

Title 11, section 703 (d) of the California Code of Regulations requires criminal record checks of all personnel who have access to Criminal Offender Record Information (CORI). Pursuant to this requirement, applicants for this position will be required to submit fingerprints to the Department of Justice and be cleared before hiring. In accordance with DCA's (CORI) procedures, clearance shall be maintained while employed in a CORI-designated position. Additionally, the incumbent routinely works with sensitive and confidential issues and/or materials and is expected to maintain the privacy and confidentiality of documents and topics pertaining to individuals or to sensitive program matters at all times.

**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 & Safety analyst.)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

**I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.**

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

**Revised: 6/2026**