



# Job Reclassification/Revision Request Form

(To be completed by Department or Division Head, Supervisor or Designee)

This request form should be submitted to Human Resources no later than 72 hours prior to the next Civil Service Commission meeting date. The meeting schedule can be found at: <http://urbanaininois.us/boards/civil-service-commission>.

## Section 1—Proposed Reclassification/Revision Information

This is a request for:  Job Description Revision  Reclassification  Both

Department Finance Division Financial Services

Current Title Administrative Assistant I Current Grade 26

Requested Title Administrative Assistant II Requested Grade 30

## Section 2—Reason for Job Description Revision Request

Select the areas that are being revised:  Job Summary  Essential Duties and Responsibilities

Immediate Supervisor  Education/Experience  Knowledge, Skills and Abilities  Physical Demands

Supervisory Responsibilities  Work Environment  Licenses, Certificates, and Memberships

## Section 3—Reason for Reclassification Request

Reorganization  Reallocation of duties from unfilled vacancy(ies)

Higher level duties proposed by department/division head  Other: \_\_\_\_\_

Per Civil Service Rule 2.10, factors that determine the need for reclassification may include the following reasons. Please select all of the changes that have occurred to the classification which would warrant a reclassification:

Complexity of Work  Access to Confidential Information

Independence of Action  Organizational Accountability

Fiscal Responsibility  Supervision Exercised

Other: \_\_\_\_\_

## Section 4—Attachments

In addition to this completed form, the following information must accompany each reclassification request:

- ✓ Cover memo summarizing significant job description changes and why the reclassification is warranted (base this on the increased duties and the scope of responsibilities)
- ✓ Revised position description using “Tracked Changes” to show revisions.
- ✓ Department organizational chart (list position titles and employee names)

### Approvals

Elizabeth J. Red 10-24-14

Supervisor \_\_\_\_\_ Date \_\_\_\_\_ Department Head \_\_\_\_\_ Date \_\_\_\_\_

Human Resources Only:

Received on date: \_\_\_\_\_ By: \_\_\_\_\_



To: Vacellia Clark, Personnel Manager

From: Elizabeth Beaty, Administrative Services Manager

Date: August 12, 2014

Re: Administrative Assistant I Job Description

I would like to submit changes to the Administrative Assistant I job description for consideration by the Civil Service Commission. Over the past year, the duties and responsibilities of this position have needed to change due to the following:

- Changes in policy in regards to how we process certain city licenses and fines
- Shifts in the responsibilities and personnel assigned to the Administrative Services Manager, due to staff changes within the Finance Department

Due to the above listed changes, the need to restructure and assign new job duties has occurred. The suggested job updates outlined in the revised job description have been assigned to the Administrative Assistant I in an effort to balance the duties and tasks of the Finance Department staff. It's also important to note, the level of responsibility and accountability has increased significantly.



# ADMINISTRATIVE ASSISTANT ~~I~~II(FINANCE)

## JOB DESCRIPTION

<b>Department:</b> Finance	<b>Division:</b> Financial Services
<b>Work Location:</b> Urbana City Building	<b>Percent Time:</b> 100%
<b>Job Type:</b> Civil Service	<b>FLSA Status:</b> Non-Exempt
<b>Reports To:</b> <u>Administrative Services</u> Office Manager	<b>Union:</b> Non-Union

## **JOB SUMMARY**

Performs secretarial duties in the Finance Department; answers phones, logs and verifies data using computer systems; creates and maintains filing systems; responds to citizen requests for information and performs routine data entry as required; prepares and processes outgoing correspondence; processes City liability insurance claim forms and Finance Department purchase orders; responsible for handling sensitive and confidential information and situations.

### Defining Class Characteristics:

Incumbents in this classification assist and act in a confidential capacity and report directly to a department head or executive manager. The work requires the interpretation and application of policies, procedures, and regulations and involves frequent contact with the public, as well as performing various research support functions. This class is distinguished from other administrative classifications by its confidential duties, the level of responsibility assumed, and the complexity of duties assigned. Employees at this level are required to be fully trained in all procedures related to the assigned area(s) of responsibility and are required to maintain a high level of confidentiality

## **ESSENTIAL FUNCTIONS**

- Sorts and distributes incoming departmental mail; opens Comptroller's mail unless it is confidential.
- Takes, logs, and distributes telephone messages to the Finance Department; transfers calls to other departments and to voice-mail.
- Maintains and updates daily the revenue check register and distributes checks; updates weekly summary and maintains records each fiscal year.
- Reconciles the petty cash check book and petty cash box at the request of the Administrative Services Manager.
- At the request or in the absence of the Administrative Services Manager, enters bi-weekly payroll for the Finance Department; reviews payroll edit report and checks for errors; corrects any and all errors found, before finalizing payroll.
- Enters weekly purchase orders for the Finance Department as requested by the Administrative Services Manager.

- Performs analysis for certain revenues received and processed. Such as, payments from other government agencies (e.g. State of Illinois, Champaign County, City of Champaign, etc.). Discrepancies or fluctuations in payments should be noted and brought to the attention of the Administrative Services Manager.
- Assists the Comptroller and Administrative Services Manager with verifying bank and investment transactions on accounts; information is confidential and sensitive in nature.
- Processes bi-weekly bulk mailing of parking ticket notices: from zip code printout, divide into 5-digit, 3-digit and remainder into groups and figures postage amounts from that list; ~~bursting,~~ sorting, bundling notices and takes to Post Office; -calculates cost according to bulk rates obtained from Post Office and writes and signs petty cash check.
- Processes information from The Illinois Law Enforcement Agencies Data System (LEADS); information contains registered owner information to assist in license plate processing; information is confidential and sensitive in nature.
- Receives telephone calls; responds to requests for information or refers as necessary; maintains a reference manual to assist in responding to requests and in referring calls to appropriate departments and divisions.
- Types correspondence, reports, purchase orders for petty cash checking, and contracts ~~on word processor~~ for the Comptroller and, Office Administrative Services Manager, and Information Services Manager.
- Updates filing systems and databases; prints spreadsheets for the Municipal Collector's Office.
- Creates and designs numerous forms, applications, diagrams, and original documents for the Finance Department, using various computer software, graphics and clip-art.
- Responsible for creating and designing new Access databases at the request of the Administrative Services Manager to support new functions and to update old ones performed and managed by the Finance Department, as well as other departments at the City.
- Works with ~~Office Administrative Services~~ Manager to originate and distribute licenses to companies and businesses each fiscal year; assists in maintaining business master of names, addresses and business numbers. Responsible for Balancing city licenses on a quarterly basis.
- Updates daily address changes for returned parking correspondence on vehicle registration data base in order to ensure accuracy of information in vehicle registration data base and to maintain correct information for mailings.
- Enters parking space renter updates and rental payments into the Parking Rental computer system the same day they are received; generates bills for rent due and prepares for mailing on a quarterly basis in accordance to standard operating procedures.
- Responsible for validated parking entry and billing, as well as Lincoln Square Village monthly parking billing; calculates and prepares requests for billing for the Champaign County and Federal Courthouse jurors; also calculates the quarterly billing for Vehicles for Hire business and driver fees payable to the City of Champaign.
- ~~May be assigned to a~~ Assists the Fire and/or Police Pension Board by preparing and sending agenda to participants in advance of meeting, setting-up and operating tape recorder, taking and revising minutes per the Board, and typing draft and final minutes.

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- Types and prepares charts and reports, such as Multi-Year Financial Plan, Comprehensive Annual Financial Report, Police Pension, Fire Pension, Library Audit Reports; copies and assembles reports using a binding machine for annual audit, budget and other financial reports; distributes reports to appropriate personnel, libraries and cities.
- Maintains and coordinates monthly City cell phone charges for each department and phone lines by copying phone bills for each Department, sends copies to Department Secretaries with the due date, receives all monies for phone bills; updates telephone reconciliation records monthly, tracks all departments reimbursing the City for personal calls.
- - ~~Types, signs and mails~~ Submits insurance forms and claim information to insurance company for all claims the City is involved with.
- Maintains City vehicle inventory list with assistance from Fleet Manager ~~and in order to keep~~ in constant contact with insurance company regarding changes or insurance claims involving City vehicles.
- Retrieves and documents information on appropriate in-take forms from citizens involved in insurance claims with City, in absence of Comptroller or his/her designee.
- Prepares journal entries for all checks returned to the Finance Department; contacts citizens through written correspondence to collect on returned checks not honored by bank; charges and processes returned check fees.
- Replaces copy cartridge and toner cartridge; contacts Xerox service technician for all repairs for Xerox machine on first floor and second floor of City Building.
- ~~As requested, V~~ verifies all reconciled bank statements monthly ~~using main frame computer to ensure accuracy to general ledger.~~
- - ~~Maintains a running tally, with the assistance of the Personnel Division, of total days without a work loss injury on a posted sign for the view of all persons entering and leaving the City building.~~
- Orders, as needed or requested, inventory of office supplies for the Finance Department and general office supplies for other departments.
- Issues various licenses and permits including, but not limited to: bike permits, disabled parking permits, Lincoln Square Employee/Tenant parking permits, West Urbana Special Parking Zone Permits and ~~taxi driver~~ Vehicles for Hire driver licenses.
- Assists the Comptroller, ~~Office Administrative Services~~ Manager, and/or Deputy Comptroller/Account Clerk Supervisor when needed.
- Performs duties of ~~the Clerk-Cashier~~ Customer Service Account Clerk, such as cashier duties, as needed during the day, especially during times when the only one present in the Finance ~~office~~ Office.
- Conducts mailing duties for City Clerk's Office, when necessary.
- Copies all letters, files, forms, and documents as needed within the scope and function of the office.
- Works with confidential files and information in an appropriate manner.

~~— Seans parking ticket complaints and maintains database on website that includes converting to PDF files and indexing of documents.~~

- Maintains outstanding and paid NTA and OV files, including status verification on the Champaign County Circuit Clerk's website.
- Performs other related duties as assigned.

## **JOB REQUIREMENTS**

### **Education & Experience**

- Knowledge and abilities typically acquired through graduation from high school, supplemented by additional course work in office practices and procedures, and two (2) years of work experience in a standard office setting working with the public.

### **Knowledge of**

- Business English, punctuation, spelling, grammar, and business math.
- Office practices and procedures and operation of standard office equipment, including a personal computer, copier, cash register, electric letter opener, fax machine, ~~bursting-folding~~ machine, binding machine, multi-line telephone, and voice mail.

### **Skills**

**Interpersonal skills** – Ability to remain calm and professional under pressure and communicate verbally in a clear, concise and efficient manner. Ability to accept change by demonstrating a positive attitude when changes occurs. Ability to communicate effectively with a wide variety of people with different socioeconomic status, educational levels, interests and emotional condition during the communicating and service needs that include occasional confrontational conditions and tensions in citizens. Ability to maintain a professional attitude and approach to communications under occasional periods of verbal abuse from customers. Ability to maintain excellent attendance and flexibility in scheduling. Ability to meet office objectives, daily talk times.

**Presentation/communication skills** – Working knowledge of business office practices, of English grammar, spelling, punctuation and composition and of arithmetic. Ability to understand and effectively apply complex oral and written instructions and procedures.

**Regulatory knowledge** - Knowledge after training, of department functions, responsibilities, and organizational structure. Ability to understand and comprehend the meaning of legal language of a variety of statues and the administrative language of rules, regulations, and procedures, and to commit to recallable memory the primary factors of each that are pertinent to customers for obtaining permits and licenses, and the ability to answer questions around laws and ordinances.

**Organizational skills** - Ability to work effectively in an open office environment with frequent interruptions and distractions, a moderate noise level, fluctuating workloads at a consistently high level, requiring special processing of some cases, priority changes and schedule adjustments.

**Computer systems /software** – Skill in operating a personal computer accurately using database, word processing and spreadsheet software. Ability to learn procedures for and to effectively operate

specialized equipment and programs. Ability to acquire knowledge of operation of a telephone and department programs and policies in a timely manner.

**Quality of Work:** Maintains high standards of accuracy and attention to detail in exercising duties and responsibilities. Exercises immediate remedial action to correct any quality deficiencies that occur in areas of responsibility. Maintains high quality communication and interacts with all City departments and divisions, co-workers and the general public.

**Ability to**

- ~~Originate correspondence in accordance with standard format. Prepare correspondence, reports, budgets, letters, memos, reports, spread sheets, agendas, etc., with the proper format, punctuation, spelling and grammar, using all parts of speech.~~
- Develop and maintain filing systems.
- Deal with the public tactfully in difficult work situations.
- Maintain financial records and logs using computer data entry methods.
- Transcribe accurately and efficiently from a dictaphone or comparable voice recording device.
- Type at the rate of sixty (60) words per minute on a personal computer keyboard.

**Licenses, Certifications and Memberships Required**

- Must possess a valid State of Illinois driver's license or obtain one within fifteen (15) days of employment.

~~Stenographic ability may be required at the discretion of the Department Head or Division Head.~~

**RESPONSIBLE FOR:**

- Ensuring data assigned is accurately entered into the computer records and programs.
- Handling the Finance Department during lunch hours, co-workers' vacations, and other co-worker absences.
- No supervisory responsibility.

**CONTACTS: INTERNAL/EXTERNAL**

- Daily contacts with the public to refer/resolve complaints and answer questions.
- Daily contact with other departments.

**Supplemental Information**

**Working Environment:** Work typically occurs in a standard office setting. Standard office setting.

**Physical Requirements:** Must be able to lift 30 lbs. (bulk mail). Must be physically able to operate a variety of machinery and equipment including office machines such as computers, typewriters, calculators, copiers, cellular telephones, two-way radios, etc. May be required to work beyond normal working hours to accommodate customers during times of crisis, including natural or man-made disasters.

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**Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents; visually inspect work in progress.

**Hearing:** Hear in the normal audio range with or without correction. Must be able to use a two-way radio.

*The work environment characteristics described herein are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

**SPECIAL EFFORT REQUIRED:**

~~Attention to detail.~~

- Works with confidential information.

~~Must possess or obtain a valid State of Illinois Driver's License within sixty (60) days of employment.~~

~~Must be bondable.~~

Prepared By: Elizabeth Beaty and Elizabeth Borman August 12, 2014  
Signature Date

Approved By: \_\_\_\_\_  
Department Head Date

Approved By: \_\_\_\_\_  
Personnel Mgr. Date

Approved By: \_\_\_\_\_  
Civil Service Commission Date

Approved By: \_\_\_\_\_  
Human Relations Officer Date

**Class Specification History**

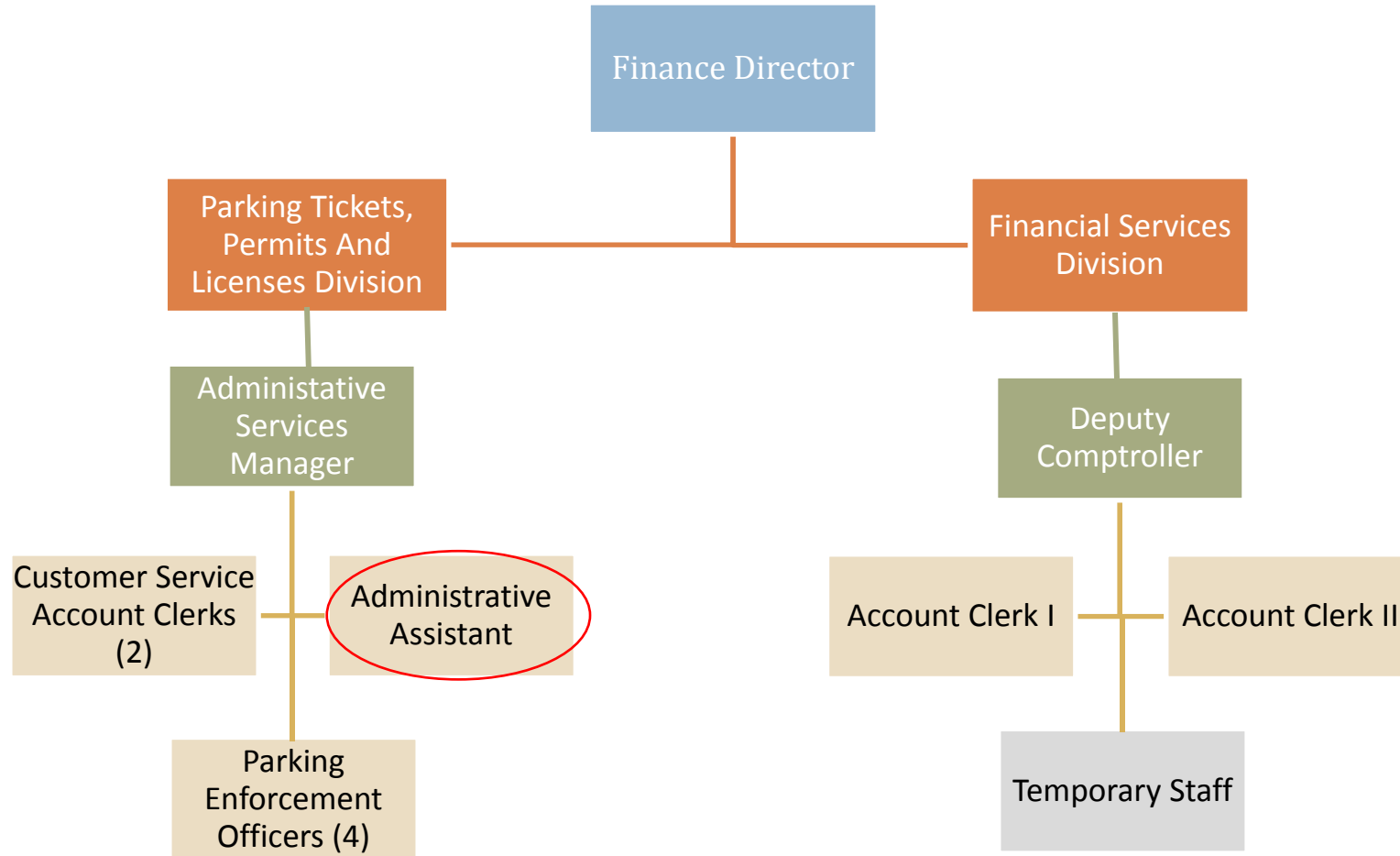
General revision: 05/1997

*For HR/Finance Use*

<b>Title Code</b> 020	<b>Pay Grade</b> <del>26-30</del>
<b>EEO Category</b> 6- Administrative Support	



# Finance Department Organizational Chart



### Key

- Appointee/Department Head
- Appointee/Division Head
- Civil Service employee
- Non-Civil Service (reg. part-time, seasonal or temporary)