

AGENDA ITEM 1 E
Consent Item

MEMORANDUM

DATE: August 6, 2026

TO: El Dorado County Transit Authority

FROM: Steffi Ahart, Human Resources Manager

SUBJECT: Approval of Updated Job Descriptions for Fiscal Specialist and Administrative Assistant

REQUESTED ACTION:
BY MOTION,

Approve the Revised Job Descriptions for the Fiscal Specialist and Administrative Assistant Classifications

BACKGROUND

On March 5, 2026, the Board of Directors approved Agenda Item 2A, which included revisions to the Agency's Personnel Allocation Table and Organizational Chart for Fiscal Year 2026/27. As part of that action, the Board approved changing the job classification titles of Fiscal Technician I/II to Fiscal Specialist and Office Assistant I/II to Administrative Assistant to better reflect the duties and responsibilities of the positions and align with current industry standards.

During implementation of the Board-approved organizational changes, staff identified that while the classification title changes were approved, the associated job descriptions required additional revisions to fully remove references to the former I/II classification structure and incorporate the consolidated classification language. The attached revisions complete implementation of the Board's previously approved classification changes and ensure the job descriptions accurately reflect the Agency's current organizational structure.

DISCUSSION

The revised job descriptions update the classification titles and remove outdated references to the former I/II classifications while maintaining the core duties and responsibilities of each position. The revisions also clarify the purpose and scope of each classification, improve consistency with the Agency's current organizational structure, and update terminology to reflect current operational practices.

The proposed revisions do not create new positions, increase staffing levels, or modify the Agency's approved Personnel Allocation Table. Rather, they finalize the implementation of the Board-approved classification changes adopted on March 5, 2026.

The attached redline versions identify the proposed revisions for Board review.

FISCAL IMPACT

There is no fiscal impact associated with approval of the revised job descriptions. The classification title changes and associated compensation were previously approved by the Board as part of the Fiscal Year 2026/27 Personnel Allocation Table.



~~October 2017~~ August 2026

FLSA: Non-Exempt

FISCAL TECHNICIAN I/H FISCAL SPECIALIST

Hourly Rate: ~~\$24.90–\$33.37~~ \$25.57–\$34.27 with benefit package

DEFINITION

Under general ~~supervision (Fiscal Technician I)~~ to direction (~~Fiscal Technician II~~), perform paraprofessional and clerical accounting work required in the processing and maintenance of fiscal and statistical records for El Dorado Transit's financial functions; areas of responsibility include, but are not limited to, accounts payable, accounts receivable, payroll, and cash handling; assists in compiling information and data for financial reports; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general ~~supervision (Fiscal Technician I)~~ or direction (~~Fiscal Technician II~~) from the ~~Finance~~ Fiscal Manager. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

Fiscal Technician I: This is the entry level classification in the Fiscal Technician series. Initially under close supervision, incumbents learn and perform fiscal related duties. As experience is gained, assignments become more varied, complex, and difficult; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the II level, but are not expected to function at the same skill 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.

Fiscal Technician II: This is the fully qualified journey-level classification ~~in the Fiscal Technician series~~ responsible for performing the full range of paraprofessional accounting support duties in assigned areas which include, but are not limited to, accounts payable, accounts receivable, payroll, and cash handling. Positions at this level are expected to work independently, and exercise judgment and initiative within established guidelines. 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.

~~Positions in the Fiscal Technician class series are flexibly staffed and positions at the II level are normally filled by advancement from the I level; progression to the Fiscal Technician II level is dependent on (i) satisfactory work performance; (ii) the incumbent meeting the minimum qualifications for the classification; (iii) management affirmation that the position is performing the full range of duties assigned to the classification, and (iv) management approval for progression to the II level.~~

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

~~Positions at the Fiscal Technician I level may perform some of these duties in a learning capacity.~~

- Performs paraprofessional and clerical accounting work required in the processing and maintenance of fiscal and statistical records for El Dorado Transit's financial functions; areas of responsibility include, but are not limited to, accounts payable, accounts receivable, payroll, and cash handling.
- ~~Administers the Secondary for~~ payroll process; maintains up to date employee and agency information in the payroll system; reviews and verifies time cards and confirms leave requests/balances; verifies pay increases and computes any retro-active pay; confirms benefits, retirement and deferred compensation contributions and related deductions; ensures compliance with bargaining unit agreements and individual selections; calculates and processes manual checks; submits documents to payroll system vendor; checks and confirms payroll prior to final processing; submits reports to retirement and deferred compensation providers.
- Administers the accounts payable function; collects and assembles invoices and confirms proper documentation and signatures; sets invoices up for payment; maintains all accounts payable vendor accounts in automated system; reconciles all accounts payable invoices to monthly statements received; investigates and resolves discrepancies; sets up, processes and distributes checks; reviews accounts payable general ledger entries for accuracy prior to month end closing.
- Assists in the collection of monies owed to El Dorado Transit; -works with external service providers. and maintains accounts receivable files and records.
- Assists in the compilation and distribution of fiscal reports; places fiscal data into spreadsheets or automated system for report generation.
- Coordinates and processes monthly ALTA client orders; reviews authorizations to ensure they are current; prepares monthly check sheets for drivers for billing purposes; prepares ALTA monthly billing for scrip and passes.
- Prepares and distributes pass fare merchandise to retail locations; prepares sales packages, which include scrip, passes, and a log sheet; reconciles sales for each site and prepares deposit; resolves fare discrepancies.
- Counts and reconciles daily deposits from transit system fare boxes; confirms and deposits funds.
- Logs incoming checks and prepares bank deposits; reconciles bank deposit slips weekly and resolves discrepancies.
- Assists with the purchasing function by entering and processing purchase orders in the system; verifies bid paperwork is complete and includes authorized signatures; maintains purchase order files.
- Performs general office support; answers the telephone and assists callers or directs to correct staff member; organizes and maintains various files; types correspondence, reports, and forms; sets up yearly fiscal year files; prepares files for archival.
- ~~Positions assigned to this classification may be required to operate a motor vehicle to pick up and deliver materials, or to attend business related meetings.~~
- Conduct monthly safety inspections of AEDs (Automated External Defibrillators), eyewash stations, fire extinguishers, first aid kits, and ladders to ensure compliance with safety regulations and operational readiness. Perform additional safety and facility-related duties as assigned.
- Performs related duties as assigned.

QUALIFICATIONS

~~Positions at the Fiscal Technician I level may exercise some of these knowledge and abilities statements in a learning capacity.~~

Knowledge of:

- Public agency financial operations and services including, but not limited to, accounts payable, accounts receivable, payroll, and cash handling.
- Principles and practices of automated financial record keeping systems.
- Methods, practices, and procedures of bookkeeping, including accounts receivable, and accounts payable processes.
- Public agency payroll processes, including retirement plan and benefits providers reporting processes.
- Public agency procurement processes, rules and regulations.
- Cash handling principles and techniques.
- Methods and techniques of balancing cash transactions, and bank statements.
- Methods and techniques of reconciling accounts and statements.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Complex recordkeeping principles and practices.
- Business mathematical principles.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and El Dorado Transit staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination including computers and software relevant to the work performed.

Ability to:

- Provide technical support to the full range of fiscal services.
- Coordinate services with external service providers and internal departments.
- Respond to and effectively prioritize multiple requests for service.
- Research and compile data for fiscal reports and records.
- Organize and maintain accurate fiscal files and records.
- Make accurate arithmetic calculations.
- Demonstrate excellent customer service skills.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Understand and carry out oral and written directions.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.
- Establish and maintain effective working relationships with those encountered in the course of the work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education and Experience:

~~Fiscal Technician I/H:~~ Equivalent to completion of the twelfth (12th) grade supplemented by specialized training in accounting, payroll or a related field.

~~Fiscal Technician I:~~ ~~Two (2) years of experience performing a variety of technical fiscal, accounting, and financial record keeping duties.~~

Experience:

~~Fiscal Technician H:~~ Three (3) years of increasingly responsible experience performing a variety of technical fiscal, accounting, and financial record keeping duties, or one (1) year of technical fiscal program support experience at a level equivalent to the El Dorado Transit's classification of Fiscal Technician I.

Licenses and Certifications:

- Possession of, and ability to maintain, a valid California Class C Driver's License and a safe driving record throughout employment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work primarily in an office environment with moderate noise levels, controlled temperature conditions and no exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.



OFFICE ASSISTANT-ADMINISTRATIVE ASSISTANT

Hourly Rate: ~~\$19.45~~\$22.05 – ~~\$26.07~~\$29.55 with benefit package

DEFINITION

Under immediate ~~(Office Assistant I) or general (Office Assistant II)~~ supervision, performs a variety of office administrative and clerical ~~tasks-duties~~ in support of assigned areas of responsibility, ~~which includes, including~~ but ~~is~~ not limited to, general administration, customer service, human resources and marketing ~~activities~~; ~~provides~~Provides customer service and assistance to the general public and transit customers; maintains a ~~wide~~ variety of records ~~and~~ files and databases; prepares correspondence and reports; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate ~~(Office Assistant I) or general (Office Assistant II)~~ supervision from assigned supervisory or management staff. ~~and~~ Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

Office Assistant I: This is the entry level classification in the Office Assistant series. Initially under close supervision, incumbents learn and perform office clerical administrative support duties. As experience is gained, assignments become more varied, complex, and difficult; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the II level, but are not expected to function at the same skill 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.

Office Assistant II: This is the fully qualified journey level classification in the Office Assistant series responsible for providing the full range of administrative and clerical support to assigned areas. Positions at this level are expected to work independently and exercise judgment and initiative within established guidelines. 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.

Positions in the Office Assistant class series are flexibly staffed and positions at the II level are normally filled by advancement from the I level; progression to the Office Assistant II level is dependent on (i) satisfactory work performance; (ii) the incumbent meeting the minimum qualifications for the classification; (iii) management affirmation that the position is performing the full range of duties assigned to the classification, and (iv) management approval for progression to the II level.

This classification performs a broad range of administrative, clerical, and office support duties in support of assigned departments or programs. Initially, incumbents may work under close supervision while learning departmental procedures, office practices, and administrative processes. As experience is gained, assignments become more varied, complex, and difficult, and incumbents are expected to perform duties with increasing independence, initiative, and sound judgment within established guidelines. Responsibilities may include providing administrative support, maintaining records and files, preparing correspondence and reports, responding to

inquiries, coordinating office activities, and assisting staff and the public. Work requires knowledge of office procedures and organizational policies, attention to detail, and the ability to prioritize tasks and manage multiple assignments. Positions in this classification are expected to exercise discretion and professionalism while providing effective administrative support in a fast-paced office environment.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

~~*Positions at the Office Assistant I level may perform some of these duties in a learning capacity.*~~

- Performs a variety of office administrative and clerical tasks in support of assigned areas of responsibility including, but not limited to, general administration, customer service, human resources and marketing.
- Answers the phone and directs calls; processes incoming mail; assists the public at front counter and directs public to appropriate locations and/or staff; responds to complaints and requests for information; assists in interpreting and applying regulations, policies and procedures.
- Receives and responds to inquiries from the general public and/or transit customers; provides information on transit services including, but not limited to, routes, schedules, fares, and rules/regulations; distributes literature; as requested, determines best possible route and schedule for customers and computes/quotes rates for trips.
- Performs cash handling duties; maintains cash box to sell fare merchandise; collects money, makes change and issues receipts.
- Composes, types, formats, and proofreads a wide variety of letters, documents, flyers, brochures, calendars, and memoranda; types from rough drafts, or verbal instructions; checks drafts for punctuation, spelling, and grammar.
- Provides administrative support to the human resources function including, but not limited to, assisting with the recruitment process by processing correspondence, scheduling interviews and assisting with the preparation of interview materials; completes reference checks; assists with the preparation of new hire materials and enters all applicant/candidate information into an EEO tracking spreadsheet.
- Provides administrative support to the marketing and planning function including, but not limited to, compiling, editing and entering data from surveys, reports and ridership reports; assistance in the placement of ads, press releases and public notices; coordinating the production and distribution of promotional materials, bus timetables and related literature; and assisting with outreach and social media activities.
- Compiles information and data for reports and other documents; prepares, assembles and distributes reports, manuals, articles, announcements, and other informational materials.
- Maintains a variety of automated and manual files, logs, and records; using a computer, enters data to maintain and update records.
- Maintains office supplies and processes request orders.
- Positions assigned to this classification may be required to operate a motor vehicle to pick up and deliver materials, or to attend business related meetings.
- Operates standard office machines such as computer, printer, copier, fax, etc.
- Performs related duties as assigned.

QUALIFICATIONS

Positions at the Office Assistant I level may exercise some of these knowledge and abilities statements in a learning capacity.

Knowledge of:

- General office and clerical practices and procedures.
- El Dorado Transit and assigned departments programs, goals, and policies and procedures.
- Basic recordkeeping principles and practices.
- Business letter writing and the standard format for typed materials.
- Basic mathematical principles and cash handling techniques.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and El Dorado Transit staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination including computers and software relevant to the work performed.

Ability to:

- Perform clerical administrative and office support tasks related to the department to which assigned.
- Respond to multiple requests for assistance and determine priorities.
- Organize and maintain accurate files and records.
- Type accurately at speeds necessary for successful job performance.
- Make accurate arithmetic calculations.
- Research and compile a variety of information and materials.
- Demonstrate excellent customer service skills.
- Compose routine correspondence from brief instructions.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish and maintain effective working relationships with those encountered in the course of the work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education and Experience:

Office Assistant I/II: Equivalent to completion of the twelfth (12th) grade.

Office Assistant I: One (1) year of experience performing general clerical or administrative duties.

Office Assistant II: One (1) year of general clerical or administrative experience at a level equivalent to the El Dorado Transit's class of Office Assistant I.

Licenses and Certifications:

- Possession of, and ability to maintain, a valid California Driver's License and a safe driving record throughout employment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work primarily in an office environment with moderate noise levels, controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.