



## Clerk of Circuit Court & Comptroller Okaloosa County

### Job Description Guardianship Compliance Officer

Job Specifications			
<b>Classification:</b>	Non-Exempt	<b>Department:</b>	Inspector General
<b>Supervisor:</b>	Inspector General	<b>Location:</b>	Crestview
<b>Salary Range:</b>	NE-5	<b>Schedule:</b>	Monday - Friday 8am - 5pm
<b>Revision Date:</b>	October 16, 2023	<b>Revised By:</b>	Chelsea Law

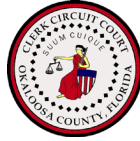
#### Job Summary:

Plan and Conduct guardianship compliance audits to enhance the Probate Court's oversight process in the protection of ward's assets pursuant to chapter 744 Florida Statute (F.S.) related to guardianship reports and activities. Responsible for auditing work such as examining, evaluating, and appraising guardianship files and records to ensure compliance with all applicable Statutes, Rules of Court Administrative Orders and other judicial directives. Formulate conclusions and communicate matters of non-compliance, and other insufficiencies and discrepancies to the Court through concise written documentation and provide additional data as needed. Prepare orders itemizing non-compliance issues and submit to court for review and signature. Issue non-compliance orders to respective attorney and guardian, and monitor files for timely and appropriate response.

#### Essential Job Functions:

The list of essential functions as outlined here is intended to be representative of the tasks performed within this classification. It is not necessarily descriptive of any one position in the class. The omission of an essential function does not preclude management from assigning duties not listed if such functions are a logical assignment to the position.

- Analyze records and input data into spreadsheet application for audit documentation and monitoring purposes.
- Formulate conclusions and report findings to the court for review and further instructions.
- Research Florida Statutes, Rules of Court, Administrative orders, and memoranda related court records and other reference material to support and document written findings presented to the court for review.
- Examine and determine action to be taken on motions, requests, petitions, certificates, complaints, and other legal documents pursuant to Clerk's statutory responsibilities.
- Prepare review memorandum, and forward case records to the assigned judge for approval or further judicial action.

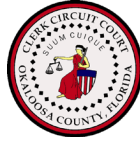


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- Provide customer assistance to the legal community, guardians, and individuals requesting technical information relative to the Clerk's document review procedures and related judicial requirements via telephone or in person. Notify supervisor of complex issues requiring administrative intervention.

### **Specific Skills/Abilities:**

- Knowledge of auditing and accounting practices and procedures.
- Knowledge of Florida Statutes and Florida Probate Rules and departmental rules and regulations pertaining to probate related work.
- Ability to objectively and independently conduct audits and develop recommendations regarding guardianship accountings.
- Knowledge of organizational policies, procedures, rules and regulations.
- Ability to perform mathematical calculations and analysis.
- Ability to understand and carry out complex oral and written instructions.
- Ability to use a calculator, PC, word processing and spreadsheet software and general office equipment.
- Ability to maintain effective working relationships with attorneys, judges, co-workers, and the general public.
- Ability to research legal resources material when analyzing guardianship records to meet judicial compliance requirements.
- Must be alert to the possibility of fraud, errors, and non-compliance in relation to guardianship records.
- Ability to gather factual evidence to ensure findings are adequately supported and documented when reporting to the court.
- Ability to use sound judgment when communicating findings to other employees, members of the public and legal community.
- Ability to work with confidential and/or sensitive data while complying with state and federal guidelines and legal advice restrictions for the Clerk & Comptroller's office.
- Ability to sit for long periods of time while concentrating on repetitious or complex tasks.
- Ability to work within time constraints and workload surges.
- Ability to work in a fast-paced environment with frequent interruptions while maintaining speed and accuracy.
- Ability to operate office equipment and work with court files stored on shelves or in cabinets.
- Must be able to recognize colors on court records.
- Travel may be required depending on work load
- Current employees may receive preference.



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### **Physical Demands:**

- Walking, standing, or sitting for extended periods of time.
- Requires stooping, bending, and lifting.
- Must be able to lift 30 lbs.

### **Education and Experience Required:**

- Graduation from an accredited college or university with a bachelor's degree in accounting or related field or two years of experience in application or interpretation of Florida Statutes related to judicial proceedings, Florida Probate rules, court processes or other matters related to court administration. Will substitute 4 years of relevant experience in lieu of degree.
- One year of experience in reviewing, drafting, or creating legal forms is desirable.
- A basic level of proficiency using Microsoft office products. (Word, Excel, Access, PowerPoint) required.
- Strong interpersonal skills are required.
- A comparable amount of training and/or experience may be substituted for the minimum qualifications.
- Type at 30 wpm preferred.
- Basic skills testing such as typing, spelling, grammar, and math may be required for this position.
- Valid driver's license required.

### **ADA Compliance:**

The Okaloosa County Clerk of Courts is an Equal Opportunity Employer. ADA requires the Clerk of the Court to provide reasonable accommodations to qualified individuals with disabilities. Prospective and current employees are invited to discuss accommodations.

### **Employee Acknowledgement:**

I have read this job description and I fully understand all my job duties and responsibilities as outlined, with or without reasonable accommodation. I understand that my job duties and responsibilities may change on a temporary or regular basis according to the needs of my location or department and if so, I will be required to perform such additional duties and responsibilities. If I have any questions about job duties not specified on this description that I am asked to perform, I should discuss them with my immediate supervisor or a member of the HR staff.