

Staff Expectations- Office Assistant, Senior Office Assistant, Supervising Office Assistant

NOTE: Our case management system is moving from Child Welfare Services/Case Management System (CWS/CMS) to Child Welfare Services-California Automated Response and Engagement System (CWS-CARES). This policy includes language, forms/templates, and resources that will be reviewed and updated as we transition into CWS-CARES.

(Revised 08/21/26)

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Forms

This policy references the following forms:

- 22-12 OA Supervision Tool

Resources

This file references the following resources:

- Tips for OA Supervision Tool This resource provides Supervising OA with prompts for how to use the OA Supervision Tool

Introduction

Office Assistants (OAs), Senior OAs, and Supervising OAs are assigned to assist CFWB units.

OA Knowledge, Skills and Abilities

OAs must have the following knowledge, skills and abilities:

- Computer skills including:
 - Microsoft office suite (Word, PowerPoint, Excel)
 - Calendar and scheduling programs
 - Data entry in various systems
 - Customer service
 - Time management and task prioritization
 - Telephone and email etiquette
 - Understand and maintain confidentiality of written and verbal records or information
 - Safety Enhanced Together (SET) practice framework and how the OA role supports positive outcomes for children, youth, and families
 - Demonstrate cultural responsiveness
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OA Duties

The following are general types of duties that OAs/unit clerks perform (this is not an all-inclusive list):

- Front desk/reception coverage including phone lines
- Obtaining pronto cards for the SWs
- Typing work-related letters, correspondence, forms and memos
- Editing and emailing daily attendance
- Fiscal duties including submitting requests for pronto cards, petty cash, p-card holder purchases and invoice payment
- Entering and updating Health and Education Passport (HEP) information
- Updating and distributing duty rosters and/or staff unit rosters
- Printing or copying court reports or other documents and entering reports into Justice Electronic Library System (JELS)
- Conducting and documenting parent and relative searches
- Submitting vital records requests
- Entering Child and Adolescent Strengths and Needs (CANS) data
- Scheduling drug tests and inputting results
- Tab filing and making new volumes for cases (after purging and organizing) and managing Electronic Records Management System (ERMS)
- Tabulating time studies
- Photocopying
- Processing 15-Day Reviews and court hearing notice sheets, minute orders, or other court documents
- Clearing, sorting, and distributing mail and faxes
- Preparing and sending work-related correspondence
- Performing Livescans once certified. See Live Scan Operator Certification
- Researching and conducting limited data entry into the CWS/CMS system
- Maintaining county vehicles, including driving to Fleet services as needed, updating the car reservation system, and ensuring required forms are in the cars
- Creating, maintaining, and distributing various packets for resources, referrals, placement, etc.
- Participating in unit and other meetings
- Scheduling meetings
- Maintaining and recording inventory
- Training others in duties above as requested
- Other duties as assigned by program.

Some offices/programs have additional duties outlined for their staff.

For the OA job description, [click here](#).

For a full list of SET practice behaviors, please refer to the [SET SharePoint page](#).

OA Duties Not to be Assigned

The following duties are **not to be assigned** to OAs/unit clerks:

- Handling any type of non-work related correspondence or business for SWs
 - Going to parent, child/youth, caregiver homes for assessment purposes
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OA Duties Not to be Assigned (cont.)

- Being responsible for obtaining parent, child/youth, caregiver signatures for legal documents (case plans, placement papers, etc.)
 - Going to court to distribute court reports on urgent timelines (ie. same day ex-parte or others that require judicial signature)
 - Caring for or supervising children brought to the office
 - Workstation installation
 - Typing the following forms:
 - Order to Produce Prisoners
 - Court Petitions
 - Errata
 - Pick-Up and Detain requests
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Supervision

All CFWB staff receive monthly supervision. Senior OA and/or Supervising OA staff may use the 22-12 form to document their supervision with staff.

Senior OAs

The following are general types of duties that Senior OAs perform in addition to OA duties outlined above (this is not an all-inclusive list):

- Assigns work
- Trains OAs
- May supervise OAs
- Evaluates work of OAs and may complete performance evaluations on staff supervised
- Develops and/or revises clerical/administrative support procedures

For the Senior OA job description, [click here](#).

Supervising OAs

The following are general types of duties that Supervising OAs perform in addition to OA duties outlined above (this is not an all-inclusive list):

- Supervised and completes performance evaluations
- Participate in hiring process for OA staff
- Summarizes and maintains financial and statistical records and data
- Submits requisitions for services, supplies, and equipment

For the Supervising OA job description, [click here](#).

Alignment with SET

This policy supports SET [Value 6](#):

- A proactive workplace culture of reflection, responsiveness, and shared responsibility.
 - A manageable and equitable workload and up-to-date technology to allow for quality work.
 - Appreciate teamwork and a multi-disciplinary approach to practice.
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