

PROBATE AUDIT SPECIALIST

Job Code	Pay Grade
18712	CL10

Nature of Work

This is independent, complex and specialized auditing work involving probate auditing within the guardianship and estate areas under the Clerk of the Circuit Court. Employees in this class review, audit and process probate documents consisting of a wide variety of legal documents, financial records and reports. The employee is expected to exercise a high degree of independent judgment based on experience and knowledge of department operations. Deviations from standard policies and procedures are referred to a higher level for decision. This is a service oriented position, which provides information to the general public and court related personnel in response to inquiries.

Minimum Qualification Requirements

- Associate's Degree and 1 year experience in Probate Court records or related work; or
- 2 years experience in Probate Court records and practical use of computer equipment; or
- An equivalent combination of education, training and/or experience.

Appointing Authority May Also Require

- Florida Driver's License or Florida Commercial Driver's License and endorsement, if any.
- Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or other disaster situations.
- Other highly desirable knowledge, skills, abilities, and credentials relevant to a position.

Illustrative Tasks (These are examples and are not all inclusive.)

- Audits initial inventory, annual and final accountings filed by guardians.
- Prepares appropriate filings, which may include: Orders Disapproving the Inventory or Accounting, Orders for Additional Bond, Orders to File Required Documents, Orders of Discharge to Court, and/or Notice to Personal Representative.
- Processes Notices of Appeal.
- Audits and reviews estate files for compliance with Florida Statutes, Rules, and Court requirements.
- Provides information and services to the general public and responds to inquiries and requests from the General Master, attorneys, litigants and the court.
- Recommends if a capacity hearing should be held for determination of rights.
- Determines if guardianship assets coincide with previous filings.
- Determines appropriateness of each disbursement made from guardianship funds.
- Determines compliance of guardian with statutory requirements.
- May relieve or fill in for employees at other work locations as needed.
- May perform a variety of tasks related to an automated office environment.
- May perform file management and inventory control tasks.
- Prepares reports and performs special projects as required.
- Performs related work as assigned or required.

Knowledge, Skills, and Abilities

- Knowledge of the principles of probate law, governmental auditing and record keeping procedures.
- Knowledge of the Florida Statutes, Rules of Court and regulations pertinent to probate records.
- Knowledge of automated office equipment, practices and procedures.

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Knowledge, Skills, and Abilities (continued)

- Knowledge of legal terminology, grammar, spelling, math and bookkeeping methods.
- Skilled in the application of quality customer service.
- Skilled in the operation of automated office equipment.
- Ability to make and apply decisions in accordance with laws, regulations and procedures.
- Ability to analyze accounts, perform computations and prepare related documents.
- Ability to understand and follow oral and written instructions and to express oneself clearly and concisely, orally and in writing.
- Ability to type with reasonable speed and accuracy.

For official use only

Revised	EEOC Code	Overtime Code
11/15	Para-Professionals	Classified