



## **Probate Audit Specialist**

**Category:** Classified  
**Pay Grade:** C17  
**Job Code:** 18712

*To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.*

### **JOB SUMMARY**

Performs independent, complex, and specialized auditing work involving probate auditing within the guardianship and estate areas under the Clerk of the Circuit Court; reviews, audits, and processes probate documents consisting of a wide variety of legal documents, financial records, and reports; provides information to the general public and court-related personnel in response to inquiries.

### **ESSENTIAL JOB FUNCTIONS (examples, 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;
- Prepares estate audits and estate order checklist for the court and creates estate orders for court consideration;
- 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 other related job duties as assigned.

### **QUALIFICATIONS**

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

Associate's degree and one (1) year of experience in Probate Court records or related work; or two (2) years of experience in Probate Court records and practical use of computer equipment; or an equivalent combination of education, training, and/or experience.

#### **Special Qualifications (May be required depending on area of assignment):**

- 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 disaster situations.
- Other knowledge, skills, abilities, and credentials required for a specific position.

**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;
- Knowledge of legal terminology, grammar, spelling, math, and bookkeeping methods.
- Skill in the application of quality customer service;
- Skill 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.

**PHYSICAL/MENTAL DEMANDS**

The work is sedentary work which requires exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Additionally, the following physical abilities are required:

- Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than with the whole hand as in handling.
- Visual ability: Sufficient to effectively operate office equipment including copier, computer, etc.; and to read and write reports, correspondence, instructions, etc.
- Hearing ability: Sufficient to hold a conversation with other individuals both in person and over a telephone; and to hear recording on transcription device.
- Speaking ability: Sufficient to communicate effectively with other individuals in person and over a telephone.
- Mental acuity: Ability to make rational decisions through sound logic and deductive processes.
- Talking: Expressing or exchanging ideas by means of the spoken word including those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- Repetitive motion: Substantial movements (motions) of the wrist, hands, and/or fingers.

**WORKING CONDITIONS**

Work is performed in a relatively safe, secure, and stable work environment.