

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Office Technician (General)	District 82/Division of Budgets/Federal Resources	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Office Technician	900-082-1138-xxx	

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

**GENERAL STATEMENT:**

Under the direct supervision of the Chief of the Office of Federal Resources Office (OFR), a Principal Transportation Engineer, and the Chief of the Office of Innovative Finance (OIF), an SSM III, the incumbent performs the following duties to assist in overall clerical support services for the Division of Budgets:

**TYPICAL DUTIES:**

Percentage	Essential (E)/Marginal (M) <sup>1</sup>	Job Description
30%	E	Responsible for maintaining all OFR filing, including daily pick up of project specific paperwork from engineers; creates new colored file folders by labeling and filing them in appropriate area for easy access; retrieves project folders from shelves as needed to add new information; and enters data into FileMaker Pro database to monitor project status. Monitors tracking sheets for active federal projects and the status of funding requests with Capital Outlay Support; runs project reports in federal databases, FADS and FMIS; and assists Funds Management Branch with updating fiscal year binders and lookup of project specific information in OFR databases.
25%	E	Serves as the Division's Records Retention Coordinator; works with the State Records Center (SRC) to archive and retrieve past files (including OFR project files) using SRC database; responsible for quarterly destruction lists of records; maintains transfer lists to SRC; coordinates annual records space counts for division; and makes periodic updates the Division's Records Retention Schedule. Works closely with IT and DPAC to update and maintain the Division's property control records for all IT equipment, furniture, and cell phones; surveys out obsolete equipment; maintains the Division's supply room inventory; processes supply orders as needed; and tracks individual supply order requests. Acts as Division's Forms Officer and coordinates forms updates with Business Services. Assists staff with ergonomic evaluations to their workstations.
25%	E	Prepares a variety of letters, memoranda, forms and reports—both technical and non-technical. Utilizes a wide variety of software applications to prepare spreadsheets, charts and graphs as part of correspondence or report packages; establishes and maintains a tickler file for follow-up and to ensure timely completion of deadlines; maintains chronological files and records of correspondence (paper and electronic); copies and distributes materials as necessary; and schedules and coordinates internal and external meetings for office chiefs and division staff.
10%	M	Acts as FHWA Highway Program Finance Course Coordinator for the Sacramento and San Diego locations; assists Division's Training Coordinator with other OFR training needs; works with IT to update internal websites as requested; serves as service award liaison; schedules candidate interviews for OFR and OIF Chiefs; and acts as the back-up liaison to Building Management for facilities requests. Obtains building access card and ID badges for all division staff and Partners (FHWA, DOF, LAO, and Capitol staff), as well as maintains a database to log badge submittals upon employee separation. Maintains DGS cards and Light Rail pass records.
5%	M	Provides back-up secretarial support to the Division's Executive Secretary and Chief Finance Officer's Executive Assistant which includes phone coverage, maintenance of individual calendars and meeting schedules, travel arrangements and itineraries, and preparation of travel expense claims and travel advance requests as necessary.

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5% M Performs payroll distribution, mail distribution, delivering (hand-walking) items to other programs, agencies, etc. Other support duties as assigned.

ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.  
MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

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### SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None

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### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have knowledge of modern office methods and equipment, business English, and correspondence format. The incumbent must have the ability to perform difficult clerical work; follow oral and written directions; evaluate situations accurately and take effective action; read and write English at a level required for successful job performance; create clear and comprehensive reports; keep confidential records; meet and deal tactfully with the public; apply specific laws, rules and office policies and procedures; and prepare correspondence utilizing a wide knowledge of vocabulary, grammar, spelling and correct departmental format.

The incumbent must have knowledge of the Microsoft Office Suite and FileMaker Pro. The incumbent must demonstrate proficiency in the use of these software programs or be able to become proficient in a short time. The incumbent must have good organizational skills, be able to create and maintain an office filing system, and possess good communication skills.

The incumbent must be able to work under pressure and quickly reset priorities at the request of the supervisor, Budgets' Division Chief, as well as other Office Chiefs.

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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Good judgment and the ability to communicate effectively are expected of the incumbent. Errors may have a significant impact on the internal and external operations of the Division of Budgets.

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### PUBLIC AND INTERNAL CONTACTS

The incumbent has contact with program and departmental staff at high decision-making levels. The incumbent must exercise tact, good judgment and prompt responsiveness in personal contacts concerning a variety of issues and requests.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee must have the ability to do the following: sit for long periods of time using a keyboard and video display terminal; develop and maintain cooperative working relationships; concentrate in order to review and create documents and meet strict deadlines; grasp the essence of new information; master new technical knowledge; prioritize and adapt to changing priorities; complete tasks or projects with short notice; deal effectively with pressure; exercise a high degree of independence in carrying out the assigned duties; and maintain focus and intensity yet remain optimistic and persistent even under adversity. Must be able to perform effectively under rigid time constraints and pressure.

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### WORK ENVIRONMENT

While at their base of operation, employee will work in multi-floor building in a climate-controlled office under artificial lighting. When in the office, employee will be exposed to hazards associated with standard office equipment.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

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EMPLOYEE (Print)

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EMPLOYEE (Signature)

DATE

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE