

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Office Technician (General)	OFFICE/BRANCH/SECTION 06/Administration/Office of Support Services	
WORKING TITLE Records Retention Technician	POSITION NUMBER 906-001-1138	EFFECTIVE DATE

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 general direction of the Chief, of Office of Support Services Branch (Staff Service Manager I), Incumbent performs a wide variety of duties essential to the proper clerical functioning of the Office of Support Services. The Office Technician (G) is expected to provide clerical support, performing with a high degree of initiative, independence, good judgment, and originality. Typical tasks include but may not be limited to the following:

**TYPICAL DUTIES:**

Percentage	Essential (E)/Marginal (M) <sup>1</sup>	Job Description
30%	E	Serves as the District 6 (D6) Records Retention Technician for the Manchester location by maintaining the Records Management Program to ensure good record keeping practices, including the retention and preservation of electronic records. Responds as the D6 contact for records management in coordination with the Headquarters Statewide Records Coordinator. Develops and monitors records retention schedule utilizing Excel spreadsheet that outlines the treatment of records regarding retention time, record storage, and destruction of records. Ensures record schedules have been reviewed and approved by the Division Chief. Coordinates request from the District divisions to submit and retrieve material from the archived room. Researches and understands the various legal requirements under which records may be released. Determines which records are essential for the continued functioning of the departmental vital records, and assure they are protected from the effects of natural or man-made deterioration. Coordinates and collects the yearly inventory date for the Annual Records Report and submit to the Departmental Records Coordinator to consolidate into the statewide Annual Records Inventory Report for DGS.
25%	E	Assist the District 6 Property Controller with inventories and inspections of property to ensure the integrity of State equipment inventory and disposal requirements. Ensures the tagging, monitoring, and physical inventorying of all expendable and non-expendable State equipment & property is in accordance with the requirements of State Administrative Manual Sections 8650 through 8652. Assist in the investigating of inventory discrepancies; assists in updating and maintaining the equipment inventory database. Processes all forms dealing with lost, stolen, damaged or destroyed State Equipment inventory database. Reconciles the Divisions of Accounting quarterly report of non-expendable equipment and submits and corrections to Accounting. Incumbent will assist with ordering and stocking the supply room. Incumbent will be responsible for researching various sources for best practices. Arranges for transport of surplus property to final destination and ensures the completion of the Certification of Disposition form is properly completed and returned to the Property Controller.
20%	E	Assists the District Office Mail room operations. Processes postage on outgoing mail, log in postage meter readings, monitors, replenishes postage machine and receives, sorts, delivers and retrieves mail from both internal and external sources. Screens telephone calls regarding mail, sorts and distributes mail, maintains and types information into various databases, maintains a list of special delivery and special mailing packages for tracking purposes. Responsible for processing overnight, special delivery and regular mail and assisting internal and external customers with addressing, questions relating to courier services, packaging, special deliveries, and other mail room related inquires. Creates labels for UPS, Golden State Overnight, and U.S. Express Mail and uses employee tracking system to locate employees; contacts contractors and vendors regarding invoices and other material that have been received without a reference to an

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- employee's name or department. Operates, adjusts and maintains a wide range of mail equipment including mailing machine, U.S. postal meter, and U.S. postal scale and UPS scale and performs other mail room-related tasks as needed. Provides status reporting to management on Mail room operations.
- 15% E Provides support for District Office and Manchester auto pool functions. Assists in administering management of auto pool activities including responding to correspondence from headquarters (HQ), completing and filing reports and providing technical support for other District 6 auto pool staff. Responsible for making recommendations on auto pool processes that will bring about changing policies or procedures which could affect the District. Assist in inventory control of auto pools at District Office and Manchester Office as assigned. Provides support as needed on monthly status reporting to management on auto pool. Reviews and approves Voyager fuel card purchase report for HQ car tags. Prepares and generates various auto pool reports from databases. Creates and manipulates information and data in a wide variety of electronic formats and computer programs which may consist of charts, graphs, and statistical information for monthly/annual reports as required by Headquarters.
- 10% M Supports the District 6 Forms & Manuals Coordinator. Act as a liaison between all District Divisions and with Headquarters Forms and Manuals production unit updating manuals and publications. Ensure orders are prepared, submitted and distributed in a timely manner. Maintains communication by e-mail & telephone with each functional unit requesting specific manuals and with HQ. Fields questions from functional units and staff regarding forms, communicates with employee relative to new forms and procedural manual updates, including but not limited to Construction Manuals, Project Development Manuals, and Environmental Manuals. Orders new manuals when available and provides a distribution system for delivery. Provides clerical support to professional staff within the unit and support to Executive Office clerical staff as needed.

<sup>1</sup>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.

### SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None

### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Incumbent must have knowledge of Department/District/Central Region organization and operations. Must have general knowledge of department and regional goals and policies and have the ability to provide direction in accomplishing them. Must possess the ability to read and write English at a level required for successful job performance; communicate effectively with internal and external customers; and operate various office equipment including mailing machines and computers. Incumbent must be able to follow verbal and written directions, evaluate situations accurately and take effective action; apply rules and office policies and procedures; exercise a high degree of initiative and independent thinking in performing assigned tasks, good judgment and ability to locate and utilize appropriate resources.

### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Error in judgment could cause loss of property and limit the effectiveness and credibility of the Administrative Unit. Error in Record Retention can cause litigation through the California Public Records Act. Inappropriately stored records could result in the loss of personal and confidential information. The inability to greet and handle customers properly could result in poor public relations and cause delays in project delivery.

### PUBLIC AND INTERNAL CONTACTS

Incumbent will have significant contact with District and Headquarters personnel, as well as contact with the public.

### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent will be required to move large or cumbersome items, up to 30 lbs. from one place to another. The incumbent will be subjected to frequent walking, standing and occasional bending, stooping and kneeling. Incumbent must be able to sit and/or stand for long durations and perform tasks utilizing a PC and general mail room equipment. Incumbent must have manual dexterity, be able to develop and maintain cooperative relationships and have the ability to focus for long periods of time. Incumbent must have the ability to multi-task, be adaptable to change and new information and must be

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able to complete tasks/projects on short notice. Incumbent may have to work in highly intense situations when mail volume is elevated and have ability to resolve emotionally charged issues reasonably and diplomatically.

**WORK ENVIRONMENT**

Incumbent will work primarily in an office environment, which is a climate-controlled office under artificial light. Due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Incumbent will be required to deliver to Departments housed in and near the District Office and Manchester facility. Incumbent may be required to work at the District Office when backup for the Mail room or Auto pool operations is needed. Incumbent may on occasion work in an enclosed "file or archive room facility" without air or heat.

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.)

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

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

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE