

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Office Technician (General)	OFFICE/BRANCH/SECTION District 5-Program/Project Management	
WORKING TITLE Office Technician (General)	POSITION NUMBER 905-100-1138-xxx	EFFECTIVE DATE 10/15/2015

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 supervision of the Project Management Support Unit Chief (a Staff Services Manager I), the Office Technician (General) performs specific tasks assigned by the PMSU Chief and / or the District Division Chief of Program Project Management. Incumbent is responsible for Division personnel related documents, memos, reports, and correspondence; travel expense claims and records; acts as Training Coordinator; maintenance, control and procurement of office supplies, furniture, IT and non-IT equipment. Provides support and assists in a broad range for the Division's personnel processes and the day-to-day operations of the Program/Project Management Division.

TYPICAL DUTIES:

Percentage	Job Description
40% E	<p>Responsible for the Program/Project Management Division inventory control (including warehouse supplies), purchases, automobile records and travel expense claims. Assist with tracking of expenses and resources.</p> <p>Within AMS creates purchase orders, service contracts and commits funds ensuring that all applicable procedures, forms, policies and laws are complied with. Maintains and prepares requests and/or inventories related office supplies, equipment (including IT equipment), and additional/replacement furniture as needed.</p> <p>Uses a Cal Card to purchase supplies for the division. Uses AMS Advantage to create Cal Card purchase orders and reconcile all purchases. Maintains departmental purchasing files and records.</p> <p>Reviews, logs and tracks automobile and travel expenses including, analyzing and approving monthly Voyager fuel card purchase report for HQ and Car Tags. Coordinates vehicle maintenance with equipment shop.</p> <p>Distributes mail and any Payroll or TEC checks that come from the cashier.</p> <p>Responsible for accurate and timely processing, tracking and distribution of travel expense claims.</p>
30% E	<p>Provides clerical support to professional staff within the unit. Responsible for independently prioritizing workload, generating, proofing and finalizing various reports and correspondence including memorandums, letters, labels, multiple mailings and reports in order to meet deadlines, and preparing correspondence to internal and external customers.</p> <p>Prepares and generates various 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. Performs general office work utilizing Microsoft Office products (Access, Excel, Word and PowerPoint), Internet Explorer, Lotus Notes, AMS Advantage and Info Advantage.</p> <p>Organize, prepare and distribute agendas and related documents for meetings including: Staff, HQ Quarterlies, Status of Projects (SOP), Task Management and/or Closeout meetings.</p>

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| 15% | E | Maintain the office filing system and record retention management. Maintain and update Project Management duty statements and organizational charts. Coordinate with staff for maintaining updated versions of various personnel forms, including but not limited to Emergency Notification Information, Private Vehicle Authorization, Conflict of Interest etc. Type, file and maintain personnel files on all Project Management staff, which contain confidential materials. Provides administrative support for the Program/Project Management Division with personnel processes and procedures for recruitment and retention. |
| 10% | E | Acts as Training Coordinator and Administrator; verifying and initiating participation of state mandated training, Capital Project Skill Development (CPSD) training as well as arranging specialized training and acting as Training Administrator in the enrollment process. |
| 5% | M | Communicates effectively with public and other employees. Utilize the Status of Projects and databases to provide basic project related information or to redirect the calls. Conducts meetings with staff and management and provides support and training on an ongoing basis to keep them apprised of changes in policies, processes and operations of the Program/Project Management Division in regards to purchases, travel, personnel, tools or training. |

¹ESSENTIAL 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

Must have knowledge of modern office methods and procedures, and the ability to operate various office machines. Must possess excellent spelling, punctuation, and grammatical skills. Have the ability to reason logically, to research and organize information, and to communicate effectively and deal tactfully with other staff. Have excellent prioritization skills. Have a basic knowledge of accounting procedures. Must be able to function effectively under pressure, exercise a high degree of initiative and work independently in performing tasks, using good judgment. Must be able to type with a high degree of accuracy. Must have knowledge of word processing and spreadsheet programs. Ability to understand and practice established rules and procedures applicable to Program/Project Management and the Department of Transportation.

Must have working knowledge of Microsoft Office products (Access, Excel, Word and PowerPoint), Internet Explorer, Outlook, AMSAdvantage and InfoAdvantage.

Ability to perform a variety of difficult duties and is expected to consistently exercise a high degree of initiative, independence and originality in performing assigned tasks.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Making inappropriate decisions or negligence to meet deadlines could result in serious consequences; such as failing to schedule a Project Development Team meeting or provide critical information to Headquarters in a timely manner.

PUBLIC AND INTERNAL CONTACTS

Incumbent will be required to effectively and courteously respond to public inquiry and to work effectively with all employees in the unit. These contacts require exercising tact and sensitivity.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent may be required to sit or stand for long periods of time, using a personal computer, and attending meetings. Large or heavy files, displays, and equipment may have to be moved and set up. Travel and meetings may extend into the evenings or require an overnight stay.

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WORK ENVIRONMENT

The incumbent works in a climate controlled building with modular furniture, under artificial lighting. Working hours are variable, typically set between the hours of 7:00a.m. and 5:00p.m. Occasional travel to meetings and training may be necessary.

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
