

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

<p><b>CLASSIFICATION TITLE</b> Office Technician (Typing)</p>	<p><b>OFFICE/BRANCH/SECTION</b> Division of Traffic Operations Office of Commercial Vehicle Operations Transportation Permits Issuance Branch</p>	
<p><b>WORKING TITLE</b> Office Technician (Typing)</p>	<p><b>POSITION NUMBER</b> 913-399-1139-xxx</p>	<p><b>EFFECTIVE</b></p>

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 by being innovative and flexible; working cooperatively with team members and others; and treating others fairly, honestly and with respect. Your efforts are important to each member of the team, as well as those we serve.

**GENERAL STATEMENT:**

Under the direction of the Branch Chief (Senior Transportation Engineer), Transportation Permits Issuance Branch, Office of Commercial Vehicle Operations, Division of Traffic Operations, the incumbent provides clerical support related to the review, analysis, accounting, and processing of transportation permit applications. The Department has the discretionary authority to issue special permits for the movement of vehicles/loads exceeding statutory limitations on the size, weight, and loading of vehicles. Requests for such special permits require the completion of an application for a transportation permit.

**TYPICAL DUTIES:**

Percentage      Job Description

- 30% (E) Review transportation permit applications from customers to ensure that they are legible and have been completely filled out. Contact the customer for additional information if necessary. Enter data from the permit application, including, but not limited to, the time the application is received, the company name, and load description into the appropriate database. Forward the completed permit application to the appropriate Permit Writer.
  
- 25% (E) Respond to customer inquiries by mail, phone, fax, emails, or in person regarding the status of an existing permit application or the process and procedure to obtain a transportation permit. Use the Database to provide status requests for external customers. Provide excellent customer service by addressing customers’ needs. Refill fax machines, copiers, scanners, printers, and other office equipment or areas with proper supplies such as paper, toner ink/cartridges, staples, drums, and general office materials.
  
- 25% (E) Once an approved permit is received from the Permit Writer, the incumbent charges the appropriate cost of the permit and then faxes the permit to the customer. Enter the following into the appropriate database: permit number, cost of the permit, method of payment, charge

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<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.

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number, credit card information or check number, and the time the permit was issued. Gather and prepare the branch's daily accounting (credit card machine detail and settlement reports) for delivery to the Cashiering Unit in the Division of Accounting. Locate all permit originals issued for the day and place them in numeric order by permit number. Explain in writing any charging or other irregularity on the back of the applicable permit or on the daily accounting report.

- 15% (E) Using the appropriate database, print, edit (for completeness and accuracy) and balance the branch's daily permit balance sheet (register) by making sure all permits processed for that day are included on the register in ascending numeric order; researching and addressing any permit number discrepancy (including break in sequence from the previous register) by locating missing permits and including their numbers, or explaining why missing numbers are not listed, on the record. Analyze all credit card charges and checks received that day to ensure proper payment was made and noted on the register and process any over/undercharge immediately using a credit card machine or other method of payment and explain in writing your actions on the register. Take the transmittals which include the register, the credit card charge slips, credit card machine detail and settlement report, checks and the transfer receipts to cashiering. Receive a copy of each signed transfer receipt from cashiering. Pick up, log, and distribute payroll warrants, light rail/bus passes, and mail from Headquarters.
- 5% (M) File permits, the branch's copy of the transmittal, and the signed copies of transfer receipts neatly, in numeric order, and in their respective areas. Receive, establish, coordinate, track and file requests for debtor accounts and contact customers upon establishment. Run monthly reports for individuals, permit service companies, or internal/external auditors to review or reconcile financial records. Produce monthly debtor account reports to Division of Accounting so they may create and mail invoices to customers for payment. Maintain stock levels in the supply room and assist with the preparation or purchase of office supplies or equipment as needed. Compose written documents such as letters, procedure manuals, memos, reports, etc. in order to provide current information, keep accurate records, document issues or situations, respond to inquiries or requests, etc. utilizing typing skills, typewriter or computer programs, notes or dictation, written communication skills, grammar skills, reading comprehension skills, proofreading and editing skills, basic mathematical/statistical skills, etc. as directed or as needed. Coordinate the maintenance of the fax machines, copiers, printers, scanners, and other office equipment. Coordinate the measurement and volume of the branch's records and purge records in compliance with the records retention schedule. Greet walk-in customers and offer help to them as needed. Clean and prepare office or cubicle settings for office moves, relocations, facility enhancements, new branch employees, etc. Set up equipment for meetings, teleconferences, or training presentations. Prepare facility key access authorization forms, track, monitor, and store keys/lock cylinders to maintain security throughout the branch.

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### SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

Does not supervise others. May give guidance to new employees relating to routine office procedures.

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### KNOWLEDGE, ABILITIES AND ANALYTICAL REQUIREMENTS

Knowledge of the Department's organization, commonly used software programs (i.e., Microsoft Outlook/Word/Excel/PowerPoint/Access) and how to operate office equipment (i.e., telephone, computer, calculator, credit card machine, copy machine, fax machine, scanner). The incumbent must be able to type 40 words per minute.

Ability to perform difficult clerical work, including basic accounting duties and calculations; make mathematical computations; interpret manuals/handbooks and apply the information accordingly; exercise good judgment and tact in dealing with a wide variety of people and interests; communicate clearly and effectively, both orally and in writing; spell, punctuate and use vocabulary and grammar correctly; organize, maintain and access files and records in a short period of time; adequately respond to multiple requests for assistance in a timely and positive manner; follow oral and written instructions; provide a high level of customer service in person, over the phone, and in writing; evaluate situations accurately and take effective action; maintain difficult records; and apply professional courtesy in all situations.

In order to achieve the Department's goals, the incumbent must possess the following General Competencies:

Analytical Thinking: Approaching a problem by using a logical, systematic, sequential approach.

Communication: Listening to others and communicating in an effective manner.

Customer Focus: Identifying and responding to current and future customer needs, and providing excellent service to internal and external customers.

Ethics and Personal Credibility: Upholding ethics and personal integrity, and demonstrating trustworthiness, reliability and responsibility.

Relationship Building: Maintaining, and strengthening relationships with others inside or outside of the organization who can provide information, assistance, and support.

Teamwork: Working effectively and cooperatively with other team members to achieve common goals, and complete assignments in a group setting.

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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

If the daily credit card duties contain errors, the State could suffer marginal financial loss and/or our customers could suffer significant loss of efficiency while trying to change the charge amount. Failing to provide the required service to our customers or staff can cause loss of productivity, effectiveness, or other factors detrimental to the State or our customers.

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The Office Technician, working with all types of people, is responsible for providing accurate information. Good judgment and tact are a prerequisite in all actions. Any breakdown in this area can result in embarrassment to the Office, Division, and Department.

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### **PUBLIC AND INTERNAL CONTACTS**

Daily contact by phone, fax, internet, and walk-ins with internal and external customers/stakeholders such as permittees (public), transporters, and permit service personnel as well as State and other public agency personnel.

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### **PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS**

Incumbent may be required to sit for long periods of time using a keyboard and video display terminal, and will be required to move general office supplies from one location to another. The incumbent must be able to move 25 pounds. The incumbent may be required to walk, take light rail, or drive to Headquarters building or other off-site locations as needed.

The incumbent must be able to develop and maintain cooperative working relationships; deal effectively with pressure; multi-task; adapt to changing priorities; maintain focus and intensity, yet remain optimistic and persistent even under adversity; open to change and new information; adapt behavior and work methods in response to new information, changing conditions, or unexpected obstacles; complete tasks/projects within a short time frame; behave in a fair and ethical manner toward others; and demonstrate a sense of responsibility and commitment to public service. The incumbent must value cultural diversity and other individual differences in the workforce.

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### **WORK ENVIRONMENT**

The incumbent will work in a cubicle within a shared room on the 1<sup>st</sup> floor of a 2-story building. The incumbent will work in a climate-controlled office under artificial light. Due to periodic problems with the heating and air conditioning, the building temperature will fluctuate.

Working hours are Monday through Friday (except approved State holidays) from 8:00 a.m. to 5:00 p.m. In partnership with the trucking industry, our branch remains open on specific holidays. Typically, these include Martin Luther King, Jr. Day, Cesar Chavez Day, and Veteran's Day. Vacations may be restricted, and overtime may be required during peak times.

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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.

Supervisor (Print)

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Supervisor (Signature)

Date

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