

**CALIFORNIA DEPARTMENT OF TRANSPORTATION  
DUTY STATEMENT**

<b>CLASSIFICATION TITLE</b> Staff Services Analyst	<b>DISTRICT/DIVISION/OFFICE</b> DES/Geotechnical Services/Geotechnical Support	
<b>WORKING TITLE</b> Staff Services Analyst	<b>POSITION NUMBER</b> 559-316-5157-XXX	<b>EFFECTIVE</b> 08/01/2012

**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 Geotechnical Laboratory Branch, Office of Geotechnical Support, and in conjunction with senior staff of Division of Research and Innovation and Geotechnical Services (GS) Data Management Committee, the incumbent performs various analytical duties in support of the development and implementation of the GS Document Conversion Program and the Geo Digital Archive of Geotechnical Data (GeoDOG), which is an electronic GS project document management system that can be accessed and utilized by the Departmental employees and other agencies via the Caltrans Intranet, for the Division of Engineering Services (DES), Materials Engineering & Testing Services & Geotechnical Services. Duties include, but not limited to, the following:

***TYPICAL DUTIES:***

Percentage                      Job Description  
Essential (E)/Marginal (M)<sup>1</sup>

25 % (E)      Serve as the Assistant Contract Manager for the Subdivision-wide GS Document Conversion Program in which all existing paper documents in the GS project file rooms located throughout the State are converted to an electronic format and uploaded to a proprietary digital document storage and retrieval system. Evaluate the scanned documents to ensure they meet the necessary requirements outlined in the Scope of Work and specification. Perform Quality Assurance/Quality Control (QA/QC) reviews of the scanned documents. Monitor the progress and/or status of the assigned Conversion Program, both from a financial and a production standpoint, and advise the Contract Manager (Branch Chief) accordingly.

Analyze the monthly invoice including work delivery and expenditures for accuracy and determine if payment is approved. Monitor resources related to the contracts of the GS Document Conversion Program and ensure expenditures are within the budget allocated.

25% (E)      Serve as the Archive Manager to the Geotechnical Services File Room (GSFR) and GeoDOG. Review and evaluate existing records management policies and procedures and

make recommendations on alternate methods of records management to streamline and make more efficient. Provide guidance and procedures regarding training development for GeoDOG. Maintain physical and electronic files, as well as the GeoDOG database of all GS electronic documents. Ensure the content of GeoDOG is accurate and up to date; as well as having administrative access to GeoDOG.

Manage user uploads to GeoDOG, analyze uploads for accuracy and completeness and notify user of upload status. Prepare periodic reports including recommendations to GS Management and staff for changes or revisions to the GSFR and/or GeoDOG. Work collaboratively with other Division and Department staff on various items related to the GSFR and/or GeoDOG.

- 25 % (E) Using the AMS Advantage EFIS system for acquisition of services and goods, prepare and coordinate requisition and purchase request and ensure that all acquisition comply with applicable state and Caltrans requirements. Analyze and ensure that all necessary service contract documents and contract related data are complete and accurate. Develop contract amendments if necessary for fund extension and/or service modification. Review and verify invoices for accuracy; resolve issues related to invoices for the contract and assure that all personnel, labor rates, charge items and unit costs are within the contract allowance and any identified charging errors are corrected quickly and efficiently; and prepare appropriate documentation to request payment. Reconcile charging discrepancies, as needed. Perform goods acquisition, which requires possession of a California Visa card and process Purchase Orders (PO), Receiving Records, PO Amendments and Statement of Accounts. Ensure accuracy of all purchases requested and delivered. Work with staff of Division and DES Administration and Department of Procurement and Contracts (DPAC) and IT as appropriate to troubleshoot technical solutions for GeoDOG system issues. Prepare and provide monthly reports to the Branch Chief/Contract Manager detailing contract funds, project progress, payments and other pertinent data needed in managing the contract.
- 15% (E) Serve as the single point of contact for GeoDOG user assistance via dedicated email box. Ensure all requests for copies of geotechnical archive documents from consultants and the public are handled in accordance with established guidelines. Incumbent will research and gather material requested through Division of Engineering Services (DES) CPRA Coordinator. May also schedule consultant and public, CPRA, and Legal reviews within geotechnical support to ensure appropriate records are provided.
- 5% (E) Update, monitor and ensure accuracy of the GS record retention schedule and prepare the Annual Records Management Report and the Records Retention Schedule.
- 5% (M) Develop and implement training materials for various assistants to the GSFR. Provide training to assistants and oversee their work. Work on special projects as assigned by the Branch Chief.

### ***SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS***

Act as lead-worker for Office Technician, Office Assistant, Student Volunteer, and/or various other assistants as provided.

### ***KNOWLEDGE, ABILITIES AND REQUIREMENTS***

The incumbent must have the analytical abilities to read and interpret contract documents and specifications as they relate to product requirements, payments, invoicing, and the general Department's accounting system. Must have the analytical abilities to read and interpret various legal documents as they relate to requests for GS records. The incumbent must have general knowledge of computer hardware and software including but not limited to MS Word, Excel, and database operation and the ability to maintain spreadsheets and database reports on the personal computer. The incumbent must also be able to communicate effectively, both orally and in writing and also have a good understanding of the departmental organization and security, functions of the Department, related policies and procedures of the Department and the DES. Must be able to analyze situations and problems that occur from contract billings, scanning and uploading operations and make reasoned recommendations to Management for resolving the issues and maintain the GS electronic document retrieval system. Incumbent must be able to comprehend complex legal documents. Must have the ability to work independently and spend extended periods of time using a personal computer.

### ***RESPONSIBILITY FOR DECISIONS AND CONSEQUENCE OF ERROR***

Responsible for monitoring the assigned contracts, updating contract status and keeping contract Manager informed as to the contract status, invoice payment status and other technical requirements. Errors could result in potential delays of contractor payments and overpayments. Failure to properly conduct the duties of this position may result in divulgence of confidential information to unauthorized parties. The loss of any or all of these records due to neglect, accident, and/or natural disaster would be catastrophic.

### ***PUBLIC AND INTERNAL CONTACTS***

The incumbent requires frequent and regular contact with Branch, Office, Division, District, and other Department staff and management, and with other governmental agencies, contractors and the general public.

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

Travel may be required including traveling to each GS satellite office throughout the State to determine the needs for incorporation into the Program. A valid California driver's license is desirable. The incumbent may be required to sit for long periods of time using a keyboard and video display terminal. Employees must be able to lift a minimum of 30lbs and may also be required to move large or cumbersome plans, diagrams, and boxes from one location to another. Must be able to effectively communicate in English and may be required to make presentation and serve on quality teams. The incumbent must be able to sustain the mental activity needed to conduct necessary research, analysis, reasoning, auditing and editing, problem solving and report creation and writing. Must be able to organize and prioritize large volumes of varied documents. The workload is subject to frequent, substantial and unexpected changes that could affect the scheduling or completion of assignments. The incumbent have the ability and aptitude to utilize a personal computer to update, retrieve, and analyze information. Must be able to multi-task efficiently, while regularly responding to routine e-mails and phone calls.

Parf #:  
Incumbent:  
Effective Date:

This position requires the incumbent to be flexible and adaptable to changes in priority and complete tasks or projects with short notice and work with others in a cooperative manner. The incumbent must have the ability to develop and maintain cooperative, collaborative working relationships and recognize difficult, emotionally charged and/or sensitive situations and handle them effectively and appropriately. Must deal effectively with pressure, maintain focus and intensity yet remain optimistic and persistent, even under adversity.

The incumbent behaves in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service. The incumbent values cultural diversity and other individual differences in the workplace.

***WORK ENVIRONMENT***

While at their base of operation, employees will work in a climate-controlled office under artificial lighting. Employees may also be required to travel and to enroll in training sessions at remote locations occasionally.

I have read, understand, and can perform the duties listed above. If you believe you may require accommodation, please discuss this with the hiring supervisor.

\_\_\_\_\_  
Employee Name (please print)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Supervisor Name (please print)

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date