STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

PM-0924 (REV 03/2006)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Staff Services Analyst	DBFS/Office of Business Services & Security/Records & Forms	
WORKING TITLE	POSITION NUMBER	EFFECTIVE DATE
Forms Designer	702-035-5157-xxx	

As a valued member of the Caltrans team, you make it possible for the Department to improve the mobility across California by being innovative and flexible; reporting to work as scheduled; 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: (BRIEF SUMMARY OF THE MAIN PURPOSE AND FUNCTIONS OF THE POSITION. DESCRIBE THE SUPERVISORY RELATIONSHIPS (INCLUDING THE CLASSIFICATION OF THE SUPERVISOR OR MANAGER TO WHOM THE INCUMBENT REPORTS.) WHEN APPROPRIATE, IDENTIFY THE NEED FOR ANY CREDENTIAL OR LICENSE (SUCH AS A DRIVERS' LICENSE.)

Under the general direction of the Branch Chief, a Staff Services Manager I, the incumbent will be responsible for assisting in the planning and organizing of the State Forms Management Program (FMP), including forms development, design and revision of the Department's business forms. The incumbent will review and analyze forms to ensure compliance with the State Administrative Manual (SAM), Information Privacy Act (IPA) and Americans with Disabilities Act (ADA). The incumbent will perform special analytical projects as they occur.

TYPICAL DUTIES: (BRIEF DESCRIPTION OF IMPORTANT DUTIES. RELATED DUTIES MAY BE GROUPED TOGETHER. USE ADDITIONAL SHEET IF NECESSARY.)

Percentage Essential (E)/Marginal (M)[1] — Job Description

50% (E) The incumbent analyzes form design requests received from Districts and Divisions and makes recommendations for improvement of the form's functionality. Using Adobe LiveCycle Forms Designer software, the incumbent designs and revises forms, ensuring that the forms meet SAM, IPA and ADA mandates.

30% (M) Using Adobe LiveCycle software, the incumbent adds dynamic and accessible form features to improve the form's functionality in its electronic format for the user. The incumbent will work with technical staff to add specialized, dynamic form features, utilizing Java Script, in the design of electronic forms.

15% (M) Identifies and analyzes problems with electronic forms and takes appropriate action for resolution; provides information, direction and guidance to all levels of Departmental staff regarding the FMP.

5% (M) Assists Statewide Forms Coordinator in planning, organizing and facilitating training and meetings for District and Division Forms Officers. Performs special analytical forms projects as they occur.

[1]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

ADA Notice For individuals with sensory disabilities, this document is available in alternate formats. For information call (916) 654-6410 or TDD (916) 654-3880 or write Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

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KNOWLEDGE, ABILITIES AND ANALYTICAL REQUIREMENTS

The incumbent must have a thorough working knowledge of all laws and regulations relating to records management, including the California Public Records Act, SAM, ADA and IPA. The incumbent must have knowledge in the areas of records retention, archive storage, and electronic forms. The incumbent must be aware of recent advances in records and forms management technology such as computer-assisted retrieval, electronic forms systems and optical disks. The incumbent must have the ability to work cooperatively with people both in person and through telephone communication; incumbent collects, develops, categorizes, maintains and summarizes information; writes clear and concise correspondence, instruction and technical analyses. The incumbent must have aptitude for using automated office equipment and database software computer programs. The incumbent must have a capacity for creative thinking. The incumbent is required to use forms-related procedures and equipment to increase the Department's productivity. The incumbent must have strong writing and verbal communication skills and the ability to adapt to change and keep current with technology.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for ensuring efficient and effective management of records and forms. The use of poorly designed or duplicate (in nature) forms may waste public and employee time.

PUBLIC AND INTERNAL CONTACTS

The incumbent will be involved in communication on a regular basis with Forms Officers from all Divisions and Districts with complex forms management problems. The incumbent will communicate on a regular basis with the Department of General Services, general public and various outside vendors.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: The incumbent may be required to sit for long periods of time, using a keyboard and monitor.
Mental: Must have the ability to multi-task, adapt to changes in priority, and focus for long periods of time. Must be able to organize and prioritize work assignments.
Emotional: The incumbent must have the ability to develop and maintain cooperative working relationships, respond appropriately to multiple workload requests and conflicting deadlines. The incumbent must have the ability to resolve emotionally-charged issues reasonably and diplomatically and be able to work as a team member with all staff.

WORK ENVIRONMENT

The incumbent will work in a climate-controlled modern office setting of mixed hard-walled and modular furniture design. The primary workspace is of modular design under artificial light containing computer and telecommunications equipment. Due to periodic problems with the heating and air conditioning, the building temperature may fluctuate.

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

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EMPLOYEE (Print)	DATE
EMPLOYEE	DATE

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

SUPERVISOR (Print)	DATE
SUPERVISOR	DATE