

EL DORADO IRRIGATION DISTRICT
Class Specification

CLASS TITLE: Records Management Technician I/II

DEFINITION

Under general supervision performs a variety of technical and responsible duties associated with the maintenance of District records and documents; collects, logs, and files District documents and records; searches for documents from a variety of sources in response to requests from other departments, the public and outside agencies; and participates in special projects that involves coordination with outside agencies in the collection of documents and records.

DISTINGUISHING CHARACTERISTICS

Records Management Technician I – This is the entry level class in the Records Management Technician series. Positions in this class typically have little or no directly related work experience. The Records Management Technician I class is distinguished from the II level by the performance of less than the full range of duties assigned to the II level. Incumbents work under immediate supervision while learning job tasks, progressing to general supervision as procedures and processes of assigned area of responsibility are learned.

Records Management Technician II – This is the journey level class in the Records Management Technician series and is distinguished from the I level by the assignment of the full range of duties, including the collection, filing and distribution of District files, records, and reports. Employees at this level receive only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the I level.

SUPERVISION RECEIVED AND EXERCISED

Records Management Technician I

Receives immediate supervision from an assigned supervisor or manager. May receive technical and functional supervision from an assigned lead.

Records Management Technician II

Receives general supervision from an assigned supervisor or manager. May provide technical and functional supervision to Records Management Technician I.

EXAMPLES OF ESSENTIAL DUTIES: *the duties specified below are representative of the range of duties assigned to this class and are not intended to be an inclusive list.*

Records Management Technician I

Collects, scans, logs, files, organizes, maintains and secures various District documents, reports and records; distributes documents upon request.

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Maintains and organizes District libraries; catalogues documents; checks documents in and out as requested by borrowers.

Maintains document storage facilities; prepares records for transportation to offsite storage facilities; ensures records and documents are properly labeled and able to be easily located.

Categorizes and classifies incoming and outgoing records in preparation for scanning.

Searches for and gathers documents from multiple locations in response to requests from District staff, public records requests, claims and legal discovery requests.

Assists in ensuring the District's record management program complies with Federal, State, and District policies, laws and regulations

Serves as a resource to District staff on records management policies and procedures; collaborates with District staff to ensure that documents are submitted to District libraries for safekeeping.

Develops and maintains electronic databases related to the maintenance of District documents and records; inventories and audits physical and electronic records to ensure consistency, accuracy, and confidentiality; trains and serves as resource to database users.

Builds and maintains positive working relationships with co-workers, other District employees and the public using principles of good customer service.

Performs related duties as assigned.

Records Management Technician II

In addition to the essential duties for the Records Management Technician I, the Records Management Technician II may also perform the following:

Trains and monitors records management staff on scanning procedures; monitors information scanned to ensure accuracy.

Assists with the planning and completion of special projects which may include traveling to other agencies to collect documents and records; coordinates the transport of such documents; receives and inventories documents.

Participates in developing and implementing goals and objectives related to assigned section.

Participates in evaluating operations and activities of the section; recommends improvements and modifications; prepares various reports on operations and activities.

Participates in developing and administering section budget; prepares cost estimates for budget recommendations; submits justifications for equipment, materials and supplies; monitors and controls expenditures.

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Participates in developing, implementing, and oversight of the District's records management program, including the development and implementation of procedures and policies related to records retention and destruction; ensures that District records are not lost, damaged or destroyed and can be retrieved in a timely manner.

QUALIFICATIONS

Records Management Technician I

Knowledge of:

English usage, spelling, grammar and punctuation. Principles of customer service. Modern office procedures, methods, and computer equipment.

Skill/Ability to:

Perform responsible duties associated with collecting, cataloging, maintaining and destroying District files, records and reports. Analyze, interpret and apply District, local, State and Federal rules and regulations related to the retention and destruction of documents, files and records. Establish and maintain effective working relationships with those contacted in the course of work. Communicate clearly and concisely, both orally and in writing. Intermittently, review documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve office issues for the public and with staff. On a continuous basis, sit at desk and/or stand at counter for long periods of time; intermittently twist and reach office equipment; write and use keyboard to communicate through written means; run errands; lift or carry weight of 10 pounds or less.

Experience and/or Education:

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible experience performing administrative clerical duties.

Education:

Equivalent to completion of the twelfth grade.

SPECIAL QUALIFICATIONS

License and Certificate:

Possession of, or ability to obtain, a valid California driver's license at the time of appointment. Individuals who do not meet this requirement due to physical disability will be reviewed on a case-by-case basis.

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Records Management Technician II

In addition to the qualifications for the Records Management Technician I:

Knowledge of:

Principles and practices of records management. Modern technological systems and applications used in records management. California Public Records Act. Advanced computer applications including software and document management applications. Filing taxonomies and naming conventions used in the maintenance of records and documents. Board retention schedules and State and Federal retention schedules for document destruction. Procedures for legal discovery requests.

Skill/Ability to:

Organize, implement and oversee a complex records management system. Interpret and explain pertinent State, District, and department laws, regulations, policies and procedures. Assist in the development and monitoring of an assigned program budget. Research and locate documents from a variety of sources. Assist in the development and recommendation of policies and procedures related to records retention. On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; participate in problem solving of operational and technical policy and procedures.

Experience and/or Education:

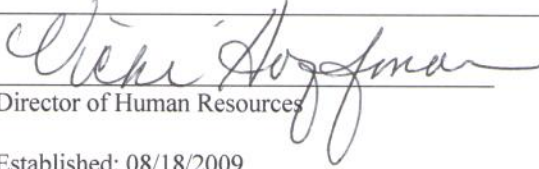
Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible experience similar to Records Management Technician I.

Education:

Equivalent to an Associate's degree with major course work in business administration or a related field.

 Director of Human Resources	<u>5/19/14</u> Date
Established: 08/18/2009 Revised: 05/16/2014 FLSA: Non-Exempt Unit: Non-Safety	