

RECORDS MANAGEMENT TECHNICIAN

This class specification indicates, in general terms, the type and level of work performed as well as the responsibilities of employees in this classification. The job functions described are not to be interpreted as being all-inclusive to any specific employee.

DEFINITION

Under general supervision, performs a variety of administrative and technical duties in support of OC San's records management program; stores, safeguards, and makes available the materials and services of assigned libraries; researches and participates in the implementation of changes to records management system, retention schedules, policies, and procedures; provides information and assistance to other OC San staff, contractors, developers, engineers, and the general public on OC San's records management program services and activities; and performs duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned supervisory and/or managerial staff. Exercises no direct supervision of staff.

CLASS CHARACTERISTICS

This classification is the first of two levels in the records management job series. Positions at this level are responsible for performing the full range of duties as assigned, working independently, and exercising judgement and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Assistant Clerk of the Board in that the latter performs the latter performs professional records management work in the development, implementation, and administration of OC San's records management program including receiving, distributing, and coordinating responses to all public records requests and ensuring compliance with established regulations and timelines.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

The following essential job functions are typical for this classification. Incumbents may not perform all of the listed job functions and/or may be required to perform additional or different job functions from those set forth below to address business needs and changing business practices.

- Performs a variety of administrative and technical duties involved in the development, implementation, and administration of OC San's records management program in accordance with legal requirements and records management policies and procedures adopted by the Board of Directors.
- Coordinates records management program support processes and workflow; assists management in developing and standardizing records management procedures and methods to continuously monitor the efficiency and effectiveness of services provided; identifies and recommends improvements in records management and electronic data management system (EDMS) workflow, procedures, and standards and use of resources and systems to assigned supervisor.
- Works with all OC San departments and divisions to identify, classify, manage, and control records and information needs; provides ready access to documents; coordinates disposition and storage of records including archives and historical documentation protection, preservation, and destruction; participates in records audits.

- Directs and guides OC San staff and consultants on locating documents in information systems and libraries.
- Prepares and reviews documents for imaging into the EDMS; coordinates and/or implements large volume imaging projects; troubleshoots system issues; reviews scanned documents for accuracy, legibility, and appropriate identification; indexes scanned records and adds them to document repositories; notifies appropriate staff on document availability and accessibility.
- Verifies and reviews materials, applications, records and reports for completeness and conformance with established regulations and procedures; applies applicable policies and procedures in determining completeness of applications, records, and reports.
- Serves as administrator for assigned records management information systems and libraries, including setting up and generating reports, updating and maintaining access rights to users and user groups, and participating in business process and system updates.
- Assists in developing and providing departmental and organization-wide training sessions on records management procedures, related policies, and use of system, equipment, and tools.
- Consults with and advises department personnel on records management issues; responds to and resolves inquiries and complaints; interprets and explains records management policies and procedures.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of records and information management; researches emerging products and enhancements and their applicability to OC San's needs.
- Performs a variety of office support duties such as scheduling and coordinating meetings; screening and receiving calls; mailing and delivering documents; and maintaining websites.
- Ensures safety and health procedures and precautions are adhered to, corrects unsafe work conditions/practices, and/or reports unsafe work conditions/practices to assigned supervisory or managerial staff.
- Performs duties as assigned.

QUALIFICATIONS

Knowledge of:

- Applicable federal, state, and local laws, codes, and ordinances relevant to area(s) of responsibility.
- Principles, practices, and methods of a modern records and information management program, including identifying, classifying, managing, converting, and controlling various documents.
- Principles and practices used in establishing and maintaining files and information retrieval systems.
- Standard filing and metadata conventions and data conversion and organization standards.
- Methods and techniques of operating and troubleshooting assigned systems and applications.
- Basic principles and techniques of research and data collection.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Current equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Perform a variety of administrative and technical duties involved in the development, implementation, and administration of OC San's records management program.
- Learn and understand the organization, operation, and services of OC San and of outside agencies as necessary to assume assigned responsibilities.
- Provide training, guidance, and support to system users.
- Read, interpret, and understand a variety of technical documents.
- Communicate technical information to a wide variety of users.
- Document procedures, guidelines, standards, and work products.

- Adapt to changing technologies and learn functionality of new equipment and systems.
- Research and compile information and data from multiple sources.
- Maintain confidentiality in maintaining critical and sensitive information, records, and reports.
- Organize own work, set priorities, and meet critical time deadlines.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Comply with safe work practices and procedures in the workplace.
- Provide a high level of customer service by effectively dealing with the public, vendors, contractors, and OC San staff.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.

Employment Standards:

Any combination of education and experience that provides the required knowledge, skills, and abilities may be qualifying as determined by OC San.

1. High school diploma or G.E.D., supplemented by specialized training or coursework in information systems, information management, or a related field.
2. Three (3) years of data and/or records management experience including indexing, scanning, converting, storing, retrieving, and destroying records in a variety of media formats.

Licenses and/or Certifications:

None

Disaster Service Workers:

All Orange County Sanitation District employees are designated Disaster Service Workers through state law (California Government Code Section 3100-3109). Employment with the Orange County Sanitation District requires the affirmation of a loyalty oath to this effect. Employees are required to complete all related training as assigned, and to return to work as ordered in the event of an emergency.

PHYSICAL DEMANDS

- Mobility to work in a standard office setting and use standard office equipment, including a computer; this is primarily a sedentary office classification although standing in work areas and walking between work areas may be required; occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information; ability to lift, carry, push, and pull materials and objects up to 35 pounds.
- Vision to read printed materials and a computer screen.
- Hearing and speech to communicate in person and over the telephone.
- Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment.

ENVIRONMENTAL ELEMENTS

- Office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.
- Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

OTHER REQUIREMENTS

- Probationary Period: All OC San employees, except classifications considered “at-will”, are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, policies, and/or resolutions. Employees who have not yet successfully completed their initial probationary period serve “at-will” and may be released from employment without cause or recourse to any appeal or grievance procedures.
- Pre-Employment: All employment offers are contingent upon successful completion of OC San’s pre-employment process, which includes a background investigation, a physical examination, and a drug screen.
- Work Location Assignment: Employees will be assigned to a work location based on business needs which may be located at any/all of OC San locations; this work location may be changed at any time.