

**CITY OF CARLSBAD
CLASS SPECIFICATION**

JOB TITLE: RECORDS TECHNICIAN

DEPARTMENT: CITY CLERK/RECORDS MANAGEMENT

BASIC FUNCTION:

Under general supervision of the Records Supervisor provide technical assistance in overseeing, coordinating and maintaining the city Records Management Program. Work with departmental records staff to identify documents and provide record system training in the creation, maintenance and disposition of city records. Respond to public and staff records inquiries. Develop, implement, and maintain policies and procedures for the records management systems, including document retention, storage, and retrieval. Perform related duties as required which may also include clerical functions.

DISTINGUISHING CHARACTERISTICS:

Functions may include, but are not limited to the following: perform a variety of duties in support of the citywide records management program; track and file paper and electronic documents, records, and other information (including contracts and agreements); organize vital and permanent documents kept by the City Clerk's office; coordinate and maintain city's official digital and manual records management systems; research records for public or staff and assist with fulfilling public records requests; provide departmental staff record system training; conduct annual department record audits; track and inventory offsite city records, and perform related work as required which may include clerical functions.

KEY RESPONSIBILITIES:

Implement the Records Management Program.

Create, update, and maintain records in the city's official record management system and provide accurate searchable data in doing so.

Analyze and filter data to retrieve desired results.

Provide record system training to departmental records staff.

Coordinate and maintain inventory of off-site records including retrieval and disposal requests from other departments.

Conduct annual department record audits.

Assist in updating the Records Retention Schedule.

Coordinate the disposition of paper records eligible for destruction. Assist or notify departments as necessary.

Process destruction of records in accordance with adopted record retention schedule and destruction guidelines.

Provide assistance to staff, and general public in regards to simple and complex record searches

Transfer inactive documents to the archives as directed by Records Supervisor.

Receive general direction from Records Supervisor; not responsible for direct supervision of staff.

Provide technical and functional direction to administrative support staff.

Assist in the preparation and maintenance of the office procedure manual.

Operate document imaging program for active and inactive records.

Answer inquiries requiring an understanding of the application of policies, procedures, rules, and regulations.

May be directed to conduct and/or participate in special projects.

Build and maintain positive working relationships with co-workers, other city employees, and the public. Use good customer service principles.

Track and monitor progress of signature routing.

Prepare, transmit, and track documents for recording; file and index current documents.

Type, edit, and proofread a variety of letters, reports, forms, notices and other correspondence for grammatical and procedural accuracy.

May act as Notary Public if commissioned.

Process administrative contracts/agreements for approval and signatures in accordance with established procedures.

Assist in the preparation of departmental budget; monitor expenditures and accounts payable functions.

Perform related duties as assigned.

QUALIFICATIONS:

To perform a job in this classification, an individual must be able to perform the essential duties as generally described in the specification. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties in a specific job. The requirements listed below are representative of the knowledge, skill and/or ability required.

Knowledge of:

- Principles and practices of customer service methods.
- Principles of records management and retention including records retention laws, best practices, retention schedules

- Modern office practices and procedures, computer equipment, and software applications related to assignment.
- Computer systems and software applications, e.g., word processing, spreadsheet or database management as required by job assignment and to manage and access records.
- Spelling, grammar, and punctuation.
- Methods and techniques of document indexing and coding.
- Procedures used in implementing legal guidelines, regulations, and laws governing confidentiality, security, and administration of municipal records.

Ability to:

- Demonstrate and foster excellent customer service.
- Understand, interpret, explain, and apply federal, state, and local & departmental policies, procedures, laws and regulations.
- Maintain accurate records and files with attention to detail.
- Process a wide range of detailed paperwork and data in accordance with specific procedures and provide information in conformance with policies and regulations.
- Develop and maintain complex records including creation, storage, retrieval and disposal.
- Keyboard at a speed necessary for successful job performance.
- Work cooperatively and establish effective relations with others.
- Communicate clearly and concisely, both orally and in writing.
- Analyze data and prepare reports.
- Operate office equipment and work with databases.
- Follow (and comply with) written and oral instructions.
- Work independently with minimal supervision or review of completed work.
- Prioritize work and meet established deadlines.
- Train others in the practice of records management program.

EXPERIENCE AND EDUCATION:

Any combination equivalent to experience and education that could likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required knowledge, skills, and abilities is: Two to four years of government file management experience working with government documents.

An associate's degree or equivalent with emphasis on modern records and information management practices.

Member of ARMA (Association of Record Managers and Administrators) or AIIM (Association for Information and Image Management) or equivalent organization.

PHYSICAL DEMANDS AND ENVIRONMENTAL SETTING:

While performing the duties of this class, an employee is regularly required to sit; talk or hear, in person and by telephone; use hands to finger, handle, feel or operate standard office equipment; and reach with hands and arms; kneel, crouch; and lift up to 35 pounds. An employee is frequently required to walk and stand. Specific vision abilities required by this job include close vision and the ability to adjust focus to read and operate office and computer equipment as necessary during the course of the work assignments.

On a continuous basis: sit at a desk for long periods of time, intermittently twist to reach equipment surrounding desk, use telephone, and write or use a keyboard to communicate through written means. Work is frequently disrupted by the need to respond to in-person and telephone inquiries.

While performing the duties, employees of this class are regularly required to use written and oral communication skills and to read and interpret narrative and statistical data, information, and documents; analyze and solve problems; use reasoning and abstract concepts; observe and interpret people and situations; learn and apply new information or skills; perform highly detailed work on multiple, concurrent tasks; work under intensive deadlines; and interact with staff, technical vendors and others encountered in the course of work.

Incumbents may occasionally need to travel to various city locations or to offsite meetings as necessary and as the assignment demands.

DATE APPROVED: May 8, 2018