

DUTY STATEMENT

GS 907T (REV. 03/05)

SHADED AREA TO REFLECT RECLASS POSITION NUMBER ONLY**INSTRUCTIONS:** Refer to the Essential Functions Duty Statement Manual for instructions on how to complete the Duty Statement.RPA-
11770-DSA

EFFECTIVE DATE:

DGS OFFICE OR CLIENT AGENCY Division of the State Architect	POSITION NUMBER (Agency - Unit - Class - Serial)
UNIT NAME AND CITY LOCATED Regional Office – San Diego	CLASS TITLE Office Technician (Typing)
WORKING DAYS AND WORKING HOURS Monday through Friday 8 a.m. to 5 p.m. (flexible)	SPECIFIC LOCATION ASSIGNED TO 10920 Via Frontera, Ste. 300 SD, CA 92127
PROPOSED INCUMBENT (If known)	CURRENT POSITION NUMBER (Agency - Unit - Class - Serial) 718-495-1139-004

YOU ARE A VALUED MEMBER OF THE DEPARTMENT'S TEAM. YOU ARE EXPECTED TO WORK COOPERATIVELY WITH TEAM MEMBERS AND OTHERS TO ENABLE THE DEPARTMENT TO PROVIDE THE HIGHEST LEVEL OF SERVICE POSSIBLE. YOUR CREATIVITY AND PRODUCTIVITY ARE ENCOURAGED. YOUR EFFORTS TO TREAT OTHERS FAIRLY, HONESTLY AND WITH RESPECT ARE IMPORTANT TO EVERYONE WHO WORKS WITH YOU.

BRIEFLY (1 or 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

The Division of the State Architect reviews plans for the construction of various state-funded projects. Under the general supervision of the Staff Services Manager I of the Business Section, the incumbent is responsible for receiving, entering, invoicing, depositing, and refunding payments for submitted plan review of various projects following Title 24 guidelines.

% of time performing duties | Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. *(Use additional sheet if necessary)*

30%	<p>The Department of General Services' (DGS) Core Values and Employee Expectations are key to the success of the Department's Mission. That mission is to "Deliver results by providing timely, cost-effective services and products that support our customers." DGS employees are to adhere to the Core Values and Employee Expectations, and to perform their duties in a way that exhibits and promotes those values and expectations.</p> <p>The following duties will be accomplished in accordance with the Department of General Services (DGS) and Division of the State Architect (DSA) policies, procedures and guidelines.</p> <p>The incumbent shall promote and be accountable for customer satisfaction and quality service and will initiate or recommend changes that promote innovative solutions to meet customer needs.</p> <p>ESSENTIAL FUNCTIONS</p> <p>In order to provide clerical support to the Business Services Section utilizing Microsoft Office software:</p> <ul style="list-style-type: none"> • Prepare a variety of complex correspondence, forms, emails, and memorandums from rough draft to final form utilizing a personal computer. • Reviews and verifies project data is entered accurately in the eTracker database and verifies completeness. • Independently creates, edits, and correctly formats correspondence, where subject matter knowledge and discretion are required by researching a number of sources and applying knowledge of the procedures and policies of the office, as requested in accordance with the DGS Correspondence Manual and using good writing skills, correct grammar and spelling.
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SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE

SUPERVISOR'S NAME (Print) Ann Marie Sacramento	SUPERVISOR'S SIGNATURE	DATE
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EMPLOYEE'S STATEMENT: I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THE POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT

The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise balance the workload.

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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20%	<ul style="list-style-type: none"> • Prepares correspondence for mailing. • Coordinates with staff and handles the duplication of documents, and prepares and sends faxes as requested by staff. <p>In order to process incoming projects following office policy, procedures and regulations and departmental correspondence guidelines:</p> <ul style="list-style-type: none"> • Independently prepares a wide variety of outgoing correspondence to send to clients such as letters, memos, technical documents, and reports using good grammar and English and knowledge of the organization. <p>Processes amending and refund letters to clients based on estimated cost as indicated in the applications using eTracker database.</p>
10%	<p>In order to process submitted project plan packages and determine fees and warrants according to Title 24 guidelines and DSA project submittal requirements:</p> <ul style="list-style-type: none"> • Receives packages from clients and or Senior Structural Engineers by verifying contents, checking for completeness, assigning application numbers, scanning applications and warrants, creating project files, and maintaining and entering data into the eTracker database. • Notifies clients regarding incomplete packages by contacting via telephone and requesting missing information/documents. • Verifies client estimates of fees by calculating, collecting, refunding and distributing fees, and invoicing additional fees as needed using eTracker database following Title 24 guidelines.
10%	<p>In order to process warrants and deposits for projects submitted following Office of Fiscal Services and State Controllers guidelines:</p> <ul style="list-style-type: none"> • Receives warrants with submittal packages by mail or in person. • Prepares deposit slips by viewing warrants received and verifying with eTracker database. • Delivers deposits to designated bank by obtaining appropriate signatures for verification of deposits.
10%	<p>In order to properly invoice and close projects submitted to DSA following DSA procedures and Title 24 guidelines:</p> <ul style="list-style-type: none"> • Verifies change orders and change order amounts using eTracker and if necessary accurately change amounts. • Verifies contract information in eTracker database in order to process further fees before closing projects. • Reviews cancellation of projects for possible refunds by viewing application data and eTracker database. • Prepares invoices for additional fees as required for projects received or refunds fees for overage of payment following Title 24 guidelines using eTracker database.
5%	<p>In order to ensure timely and accurate processing of incoming and outgoing mail and overnight delivery services in accordance with the reception desk manual, Golden State Overnight (GSO), Pitney Bowes equipment procedures, and the United States Postal Service:</p> <ul style="list-style-type: none"> • Independently handles all incoming U.S. mail, interoffice mail, and overnight mail on a daily basis by manually opening, date stamping using the automatic date stamp machine, logging using MS Word and Access and disseminating mail. • Receives and reviews all incoming accountable (certified, registered) mail from U.S. Post Office and sorts for distribution. • Prepares outgoing mail and packages on a daily basis by verifying postage amounts, typing and applying mailing labels using Pitney Bowes postage meter, scale, and mailing software following machine and software instructions.

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5%	<ul style="list-style-type: none"> • Exercises knowledge of postal regulations and rates, by creating and maintaining files, to ensure that lower bulk rates are received on large mailings. • Handles staffs questions pertaining to postage rates, delivery options, and packaging requirements. • Performs minor maintenance and schedules service calls for troubleshooting mailing equipment. • Trains other clerical staff for mailing machine operations using knowledge of the required process and tools, and the Pitney Bowes manual. • Disseminates all employee notices, job bulletins, and routing of all other operations documents. <p>In order to provide customer service to all visitors and callers to the San Diego Regional Office utilizing a multi-line phone system:</p> <ul style="list-style-type: none"> • Answers and screens all calls and gathers information the caller(s) are requesting by researching and utilizing a number of different sources, greets and interacts with the general public which may involve sensitive matters; • Transfer calls to the appropriate staff or resource, and takes concise and detailed telephone messages as needed. • Provides DSA customers with general information by researching simple questions utilizing DSA Intranet, and desk manuals. • Greets and interacts with in-person visitors, members of the State and Consumer Services Agency, Advisory Board, and other State agencies and directs them to the appropriate person and location or notifies appropriate person by telephone. • Greets and registers examination competitors and collects necessary documents. • Monitors the front reception area to ensure all security policies are strictly enforced as directed by the State Architect. Requires guests to sign in at the reception desk. • Maintains a neat and orderly reception area in order to create a positive environment for staff and visitors using good organization and paper management skills.
5%	<p>In order to ensure DSA staff have access to approved project information at the regional offices, provide a final record set of approved plans within the five day time frame; utilizing verbal/written instructions and through skills and knowledge gained through education, vendor provided training and experience.</p> <ul style="list-style-type: none"> • Provide scanning services for conversion and filing of DSA project documentation at the regional office in order to produce a final record set of plans; using optical scanner equipment to scan various sizes of plans and documents, create document lists, track documents sent to third party scanning services and quality control of scans returned from external sources • Contact clients and consultants who have scheduled a back check appointment and setup a post approval scanning appointment by telephone or email, based on priority. • Determine the capacity to scan documents on any given day by entering information into e-Tracker indicating workload projection. Supervisor requires accurate information to schedule additional scanning and indexing resources as required. • Schedule training for clients and consultants to learn the requirements of the process for submitting electronic, back check plans by scheduling training in e-Tracker and coordinating with IT staff to provide training as needed.
5%	<p>MARGINAL FUNCTIONS</p> <p>In order to provide constant coverage at the public counter assists in the coverage of the Front Reception area of the office by answering the telephone, taking messages, greeting and directing visitors, and referring inquiries to the appropriate staff according to standard office procedures.</p>

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	<p>KNOWLEDGE AND ABILITIES</p> <p><i>Knowledge of:</i> Modern office methods, supplies and equipment; business English and correspondence; principles of effective training.</p> <p><i>Ability to:</i> Perform difficult clerical work, including ability to spell correctly; use good English; make arithmetical computations; operate various office machines; follow oral and written directions; evaluate situations accurately and take effective action; read and write English at a level required for successful job performance; make clear and comprehensive reports and keep difficult records; meet and deal tactfully with the public; apply specific laws, rules and office policies and procedures; prepare correspondence independently utilizing a wide knowledge of vocabulary, grammar and spelling; communicate effectively; provide functional guidance.</p> <p>SPECIAL REQUIREMENT</p> <ul style="list-style-type: none"> • Type at a speed of not less than 40 words per minute from ordinary manuscript or printed or typewritten material. <p>DESIRABLE QUALIFICATIONS</p> <p>Special Personal Characteristics</p> <ul style="list-style-type: none"> • Dependable and good attendance record. • A demonstrated interest in assuming increasing responsibility. <p>Additional Qualifications</p> <ul style="list-style-type: none"> • Intermediate personal computer skills including electronic mail, adding machine, word processing, spreadsheet and routine database activity. • Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent. • Ability to interpret a variety of instructions furnished in written or oral form. • Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. <p>Interpersonal Skills</p> <ul style="list-style-type: none"> • Work as a team member and independently. <p>WORK ENVIRONMENT, PHYSICAL OR MENTAL ABILITIES</p> <ul style="list-style-type: none"> • Appropriate business attire for a professional office environment • Ability to frequently lift up to 25 lbs, and to occasionally lift up to 45 pounds, such as project drawings and files. • Ability to deposit monies at the local bank facility 2 to 3 times weekly.