

**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-  
**11229-DSA**

EFFECTIVE DATE:

<b>DGS OFFICE OR CLIENT AGENCY</b> Division of the State Architect	<b>POSITION NUMBER (Agency - Unit - Class - Serial)</b> 718-195-1139-xxx
<b>UNIT NAME AND CITY LOCATED</b> Business Services – Oakland	<b>CLASS TITLE</b> Office Technician (Typing)
<b>WORKING DAYS AND WORKING HOURS</b> Monday through Friday a.m. to p.m.	<b>SPECIFIC LOCATION ASSIGNED TO</b> 1515 Clay Street, Suite 1201
<b>PROPOSED INCUMBENT (If known)</b>	<b>CURRENT POSITION NUMBER (Agency - Unit - Class - Serial)</b>

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.

<b>% of time performing duties</b>	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. <i>(Use additional sheet if necessary)</i>
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><b>ESSENTIAL FUNCTIONS</b></p> <p>In order to process incoming projects following office policy, procedures and regulations and departmental correspondence guidelines:</p> <ul style="list-style-type: none"> <li>• Prepare 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.</li> <li>• Process amending and refund letters to clients based on estimated cost as indicated in the applications using e Tracker database.</li> <li>• Enter Project and Design Professionals, and client information into e-tracker under the project submittal screen.</li> </ul>

**SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE**

<b>SUPERVISOR'S NAME (Print)</b> Gennenia G. Gordon	<b>SUPERVISOR'S SIGNATURE</b>	<b>DATE</b>
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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.

<b>EMPLOYEE'S NAME (Print)</b>	<b>EMPLOYEE'S SIGNATURE</b>	<b>DATE</b>
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20%	<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"> <li>• Receive completed packages from clients and or Plan Check Engineers, ACS and FLS staff verifying contents, checking for completeness, assigning application numbers, scanning applications and warrants, creating project files, and maintaining and entering data into the eTracker database.</li> <li>• Notify clients regarding incomplete packages by contacting via telephone and requesting missing information/documents or additional fee requirements.</li> <li>• Verify client estimates of fees by calculating, collecting, refunding and distributing fees, and invoicing additional fees as needed using eTracker database following Title 24 guidelines.</li> <li>• Update daily of the Intake Architect's Spread Sheet for new projects received.</li> </ul>
15%	<p>In order to processes warrants and deposit for projects submitted following Office of Fiscal Services (OFS) and State Treasury Office (STO) services guidelines:</p> <ul style="list-style-type: none"> <li>• Receive warrants with submittal packages by mail or in person.</li> <li>• Input warrants into the eTracker database.</li> <li>• Prepare deposit slips by viewing warrants received and verify with eTracker database.</li> </ul>
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"> <li>• Verify final construction amounts for ACS and enters into eTracker database in order to process further fees before closing projects.</li> <li>• Review cancellation of projects for possible refunds by viewing application data and eTracker database.</li> <li>• Prepare invoices for additional fees as required for projects received or refunds fees for overage of payment following Title 24 guidelines using eTracker database.</li> </ul>
10%	<p>In order to provide clerical support to the Business Services Section utilizing Microsoft Office software:</p> <ul style="list-style-type: none"> <li>• Prepare a variety of correspondence, forms, emails, and memorandums from rough draft to final form utilizing a personal computer.</li> <li>• Review and verify project data is entered accurately in the eTracker database and verifies completeness.</li> <li>• Independently create, edit, and correctly format 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.</li> <li>• Prepare correspondence for mailing US Postal and Overnight services.</li> </ul>
10%	<p>In order to provide quality customer service to all clients, visitors and callers to the Oakland Regional Office utilizing a multi-line phone system:</p> <ul style="list-style-type: none"> <li>• Answers and screens all calls and gathers information the caller(s) is requesting by researching and utilizing a number of different sources, greets and interacts with the general public which may involve sensitive matters.</li> <li>• Transfer calls to the appropriate staff or resource, and takes concise and detailed telephone messages as needed.</li> <li>• Provides DSA customers with general information by researching simple questions utilizing DSA Intranet, and desk manuals.</li> <li>• Greets and interacts with clients, 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.</li> </ul>

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5%	<ul style="list-style-type: none"> <li>• Monitors the front reception area to ensure all security policies are strictly enforced as directed by the State Architect. Requires guests to sing in at the reception desk.</li> </ul> <p><b>MARGINAL FUNCTIONS</b></p> <p>In order to provide constant coverage at the public counter assists in the backup 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. Also, may serve in the back up capacity receiving projects into the mailroom, as requested. As well, may be required to serve as backup archivist when needed for business and operational needs.</p> <p>Through the use of daily dashboards, the supervisor will 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.</p> <p><b>KNOWLEDGE AND ABILITIES</b></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><b>SPECIAL REQUIREMENT</b></p> <ul style="list-style-type: none"> <li>• Type at a speed of not less than 40 words per minute from ordinary manuscript or printed or typewritten material.</li> </ul> <p><b>DESIRABLE QUALIFICATIONS</b></p> <p><b>Special Personal Characteristics</b></p> <ul style="list-style-type: none"> <li>• Dependable and predictable attendance record.</li> <li>• A demonstrated interest in assuming increased responsibility.</li> </ul> <p><b>Additional Qualifications</b></p> <ul style="list-style-type: none"> <li>• Intermediate personal computer skills including electronic mail, adding machine, word processing, spreadsheet and routine database activity.</li> <li>• Ability to add, subtract, multiply and divide, and other units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio and percentages.</li> <li>• Ability to interpret a variety of instructions furnished in written or oral form.</li> <li>• Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.</li> <li>• Ability to explain how fees and calculations were derived for project cost to clients.</li> </ul> <p><b>Interpersonal Skills</b></p> <ul style="list-style-type: none"> <li>• Work as a team member or as an individual contributor.</li> </ul>

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	<p><b>WORK ENVIRONMENT, PHYSICAL OR MENTAL ABILITIES</b></p> <ul style="list-style-type: none"><li>• Appropriate business attire for a professional office environment</li><li>• Ability to frequently lift up to 25 lbs, and to occasionally lift up to 45 pounds, such as project drawings and files.</li></ul>