



DUTY STATEMENT

Classification: Program Technician I		Position Number: 782-9927-XXX
Division/Office/Section: MMLA / FiRM / Financial Resources Section C / Loans Unit		
Location: Sacramento	Effective Date:	
Employee's Name: Vacant	Supervision Exercised: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Supervisor's Name: Jim LaTanner		
Collective Bargaining Identifier (CBID): 04		

This position requires the incumbent to maintain consistent and regular attendance; communicate effectively (orally and in writing if both appropriate) in dealing with the public and/or other employees; develop and maintain knowledge and skills related to specific tasks, methodologies, materials, tools and equipment; complete assignments in a timely and efficient manner; and, adhere to department policies and procedures regarding attendance, leave, and conduct.

POSITION DESCRIPTION: Under close supervision of the Staff Loan Officer (Supervisor) for the Loans Unit, the Program Technician I (PTI) provides technical support to unit staff. This is the entry and training level for the Program Technician job series and the journey level for less difficult program specialist work. As trainees, under close supervision and in accordance with established procedures, incumbents will use their prior math and accounting skills to learn and perform increasingly difficult duties of a semitechnical nature in a specialized departmental program that administers loans to businesses, non-profit organizations, and government entities. When incumbents become proficient in their duties, they work under general supervision and guidelines. Incumbents review and/or process forms, files, data input of business and personal financial statements and tax returns, etc., of a semitechnical nature associated with specialized departmental program focusing on loans. Work is subject to periodic review and contact with the public is moderate and basically informational in nature.

ESSENTIAL FUNCTIONS

- 45% Enter financial data from business and personal financial statements and tax returns into a database software program. Call and email loan borrowers to request current financial statements and tax returns. The task is to be performed when new financial statements and tax returns are received from loan borrowers and loan prospects.
- 20% Update the loan program database that is maintained in Microsoft Word and Excel files to track receipt of current financial statements, tax returns, insurance certificates (workers compensation, general liability, and property), state and county Uniform Commercial Code (UCC) filing expiration dates, county property tax (real estate and equipment), and life insurance policies. File UCC extensions six months before they expire. Annually, search the Secretary of State's database to confirm loan borrowers are properly registered.
- 10% Annually, create, organize, and maintain paper loan files, using the loan file checklist, to ensure the file documents are organized properly and all required items in the file checklist have been obtained. File new documents into the loan file. Scan and upload new documents into the applicant's and borrower's electronic files.
- 10% Monthly update and reconcile several databases (to ensure that the quantity and dollar amount of loans. Daily, scan and upload documents into the ZIRS database. When requested, produce reports and statistics from the loan program databases.
- 10% Send surveys to past and current borrowers, contact borrowers for return of the surveys, and upload completed surveys into the loan database. Update new or revised forms to comply with the American Disabilities Act (ADA) for readability by visually impaired persons.

MARGINAL FUNCTIONS

- 5% Weekly, schedule meeting room reservations and take notes at meetings. Daily sort and distribute incoming mail

SPECIAL REQUIREMENTS OF POSITION (IF ANY):

- ☒ Designated under Conflict of Interest Code.
- ☐ Duties performed may require annual physical.
- ☐ Duties require participation in the DMV Pull Notice Program (drives on state business 6 or more time per month).
- ☐ Requires the utilization of a self-contained breathing apparatus.*
- ☐ Operates heavy motorized vehicles.*
- ☐ Requires repetitive movement of heavy objects.*
- ☐ Performs other duties requiring high physical demand.* (Explain below)

*May require a pre-employment medical examination.

ESSENTIAL FUNCTIONS OF POSITION

- ☒ **VISION** – You must have sufficient vision to perform the following duties: identify resource requirements and prepare supporting materials; monitor all division contracts; develop training programs and examination planning; review legislation, prepare and initiate personnel transactions.
- ☒ **HEARING** – Your hearing must be sufficiently acute to perform following duties: perform phone consultations; take oral instructions from division management and personnel in other divisions
- ☒ **SPEECH** – You must have sufficient ability to speak to perform following duties: report budget, personnel, legislation, training, and administrative issues to management; speak on the phone; interact with division staff
- ☐ **CARDIAC/CIRCULATORY SYSTEM** – Your cardiac/circulatory system must be in sufficient condition to perform the following duties:
- ☐ **RESPIRATORY SYSTEM** - Your respiratory system must be in sufficient condition to perform these duties:
- ☒ **ORTHOPEDIC** – You must have the ability to use the following selected body parts – a. neck, b. shoulder, c. arm, d. elbow, e. wrist, f. hand, g. finger, h. spine, i. back, j. hip, k. leg, l. knee, m. ankle, n. foot, o. toe, to perform the following duties: use computer (a, b, c, d, e, f, g); attend meetings (h, i, j, k, l, m, n); and, use of appropriate body parts to perform other duties of this position
- ☒ **MANUAL DEXTERITY** – You must be able to perform the following duties involving manual dexterity: use the computer; telephone, calculator; FAX machine; drive vehicle to meetings, conferences workshops, etc.
- ☐ **BENDING, STOOPING, KNEELING** – You must be able to bend at the knee or waist, stoop, and kneel to perform the following duties:
- ☒ **SITTING OR STANDING** – You must be able to sit or stand for extended periods of time to perform the following duties: attend meetings, tour facilities, sit at desk for extended periods of time to perform division administrative duties that are mandatory for this position
- ☐ **LIFTING** – You must be able to lift up to pounds to perform the following duties:
- ☒ **CONCENTRATION** – You must be able to continuously concentrate to perform the following duties: develop division budget and work plans; research civil service classifications; analyze organizational structure; maintain and develop division administrative policies; develop priorities for use of division's line item expenditures; prioritize and monitor division contracts; develop and coordinate division training programs; review legislation
- ☐ **EQUILIBRIUM/BALANCE** – You must be able to perform the following duties in such a manner that you do not jeopardize the safety of others:
- ☐ **LOSS OF AWARENESS OR CONSCIOUSNESS** - You must be able to perform the following duties in such a manner that you do not jeopardize the safety of others:
- ☐ **CONTAGIOUS OR COMMUNICABLE DISEASE** - You must be able to perform the following duties in such a manner that you do not jeopardize the safety of others:
- ☐ **DRIVING OR OPERATING DANGEROUS EQUIPMENT** – You must be able to drive or operate dangerous equipment to perform the following duties:
- ☐ **Do you have any other physical or mental condition or limitation not listed above that prevent you from performing the essential functions of this position as described in this job description?**

EMPLOYEE CERTIFICATION

- ☐ Yes. I am able to perform all of the above listed essential functions of the position, and have no physical or mental condition or limitation that prevent or otherwise impair me from doing so.
- ☐ Yes, I am able to perform all of the above-listed essential functions of the position, but will require reasonable accommodation in order to do so.
- ☐ No, I am unable to perform one or more of the above-listed essential functions of the position, even with reasonable accommodation.
- ☐ I am not sure if I am able to perform on or more of the above-listed essential functions of the job.

Signature _____

Date _____