

**DUTY STATEMENT
STATE TREASURER'S OFFICE
SCHOLARSHARE INVESTMENT BOARD**

PART A	
Position No: 302-001-1139-003	Date:
Classification: Office Technician (T)	Name:
<p>Under the direct supervision of the Staff Services Manager II of the ScholarShare Investment Board, the Office Technician (T) functions as the office support personnel exercising a high degree of initiative, independence and experienced judgment to handle administrative and clerical responsibilities for a variety of analytical staff. The incumbent is responsible for prioritizing tasks and handling all office services. Specific duties include:</p>	
Percentage of time performing duties	ESSENTIAL FUNCTIONS
30%	Maintains the office master calendar and schedule, including outreach events and activities; with direction, gathers and analyzes program data; composes and reviews reports and briefings for staff; prepares charts and reports using Microsoft Office software products.
20%	Types, reviews, and edits correspondence, some of a sensitive nature, for the Deputy Executive Director and the Executive Director's signature as well as marketing pieces for public distribution; secures program materials and collateral utilizing the bid process; works with various State agencies and other vendors, on securing resource material for the office, and outreach and education events.
15%	Tactfully answers telephone calls, including answering general inquiries regarding the ScholarShare program, and its policies and procedures; refers inquiries to appropriate management or program staff; maintains Board member correspondence; and communicates with other divisions, boards and commissions of the State Treasurer's Office, and other State agencies.
15%	Functions as the Board meeting secretary. Assists with preparation, assembly, and distribution of meeting agendas and materials; schedules pre-meeting briefings with members; takes, transcribes and maintains official minutes from quarterly Board meetings.
15%	Establishes and maintains system for filing records; develops and assists in the development of office workload; initiates and tracks Cal-Card procurement and bank statement reconciliation, invoices, travel itineraries and expense claims; sorts and distributes mail; prepares personnel forms; appropriately routes all documents for approval and signature as required; and establishes and maintains a system for tracking purchases, services, and contracts.
Percentage of time performing duties	NON-ESSENTIAL FUNCTIONS
5%	Other job-related duties as required.

PHYSICAL AND MENTAL REQUIREMENTS OF ESSENTIAL FUNCTIONS

Activity	Not Required	Less than 25%	25% - 49%	50% - 74%	75% or more
Vision: Prepare correspondence, maintain electronic and paper filing systems, preparing bulk mailings, edit, proofread, enter data research information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hearing: Retrieve phone messages, answer telephone; participate in meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Speaking: Answer telephone; participate in meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking: Attend meetings; collect information.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting: Work at computer station; answer telephone; attend meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standing: File documents; photocopy; faxing documents.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balancing:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concentrating: Preparing correspondence; analyzing information; collecting and interpreting data from multiple sources.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comprehension: Understanding correspondence; analyze information; collect and interpret data from multiple sources.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working Independently: Complete assignments on time with assistance.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting up to 10 LBS occasionally: Files.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting up to 20 LBS occasionally and/or 10 LBS frequently:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting up 20-50 LBS occasionally and/or 25-50 frequently:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fingering: Dialing on telephone; typing on keyboard.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reaching: Telephone; documents on desk.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carrying: Files.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending at waist:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing or pulling:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handling: Files; documents.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operating equipment: Telephone; computer; fax machine; copier.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working indoors: Work station located in office.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Working outdoors: Occasional meetings at schools.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working in confined space: Enclosed office environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>