

**Department of Consumer Affairs**

Position Duty Statement

HR-041 (Revised 9/2019)

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<b>Classification Title</b> Office Technician (Typing)	<b>Board/Bureau/Division</b> Contractors State License Board (CSLB)
<b>Working Title</b> Business Services Technician	<b>Office/Unit/Section/Geographic Location</b> Business/Support Services/Sacramento
<b>Position Number</b> 622-110-1139-XXX	<b>Name and Effective Date</b>

General Statement: Under the general direction of the Staff Services Manager I, the Office Technician (Typing) [OT (T)] works independently performing daily clerical duties for the Business Services Unit and performing specialized cashiering duties for CSLB. The Technician will also be trained to perform duties in the following Business Services Unit divisions: Mailroom, Cashiers and IWAS. The duties include, but are not limited to, the following:

A. Specific Assignments [Essential (E) / Marginal (M) Functions]

**45% Business Services Clerical Duties (E)**

Provide clerical assistance to the Business Services Unit. Draft, edit, and send emails and letters to staff for analyst signatures. Type bulletins to go out to CSLB staff when there are issues with the building. Type emails to CSLB supervisors regarding mandatory quarterly hazard assessments. Collect and track compliance of various signage posting requests from the Department of Consumer Affairs (DCA). Schedule interviews for vacant positions. Collect and track mandatory policies (i.e. Sexual Harassment Prevention policy and CSLB's Workplace Guidelines) for all of Business Services. Track Business Services' mandatory training to ensure compliance. Draft reminder emails to staff as needed. **(35%)**

File, purge, scan and encode various Business Services forms, invoices and other documents. Schedule vendors to make repairs to CSLB's headquarters building. Escort vendors making repairs to the building. Act as the Personnel Liaison for Business Services. This includes reporting monthly dock, collecting timesheets and notify management in writing if there are documents missing. **(10%)**

**20% Cashiering Transactions (E)**

Sort various types of cashier documents by monetary amounts, such as licensee fees for new or renewed applications, and payment of fines. Verify the check amounts are correct for the requested transaction. Prepare documents by removing staples and sorting documents. Stamp receipt numbers on checks and appropriate corresponding forms and documents using 28 various revenue codes. Enter all transactions on the appropriate revenue collection reports, which are distributed to the DCA accounting unit. Log all accounting records, records of collections, and disbursement totals into the TEALE database system completely and accurately daily. Research fees sent with incorrect or incomplete information to cashier, returning to appropriate parties, such as the unit manager or the customer for review and correction.

**20% IWAS Duties (E)**

Verify all staples, paper clips, or notes are removed; all tears or holes are repaired and ensure that documents are readable prior to the scan process. Verify each batch cover sheet is correct by verifying the template written and document type are compatible and that they are accurate for the type of documents batched. Type daily emails regarding the amount of work completed and report any backlogs to management.

Compare the count on the scanner with the count on the batch cover sheet to verify all documents were captured after the documents have been scanned into the images. Resolve any issues when counts do not match by manually counting the batch to determine if problem is one of many types of scanner malfunction, prepping errors. Research will be performed until problem is resolved. Type emails to management (including Licensing managers) to notify them of any potential issues as they relate to any mistakes made or if a machine is not functioning.

Verify each image scanned to ensure the image is acceptable and legible. Perform basic clean up including de-skewing, de-speckling and deletes before accepting the batch for indexing. Input information on a batch cover sheet when acceptable. Input information and attach a scan batch cover sheet when 10 batches are verified and accepted for tracking purposes and placed in appropriate baskets for indexing. Sort and count the Exam and Waiver unit applications, and type the information onto Excel Spreadsheet.

**10% Check Processing (E)**

Prepare, endorse and verify all checks for daily deposits. Type, reconcile and verify report of collection along with other accounting reports, using spreadsheet software for submission to DCA's accounting office daily. Fiscal year-end closing requires all revenue transactions be completed, deposited, and/or sent to DCA. All daily activity reports must be entered into the accounting logs to be reconciled, closed, and prepared for storage before the new fiscal. Research and resolve difficult cashiering problems for CSLB staff and consumers.

**5% Miscellaneous (M)**

Type other correspondence for supervisor's review, such as letters to customers responding to questions regarding fees, refunds, or non-sufficient funds. Rotate counter duties with other OT's and answers phones. Lift boxes, logs, and books.

- B. Supervision Received  
The Office Technician (Typing) reports directly to and receives assignments from the Staff Services Manager I. The OT (T) may also receive direction from the Staff Services Manager II.
- C. Supervision Exercised  
None
- D. Administrative Responsibility  
None

E. Personal Contacts

Frequent contacts with CSLB staff, individual customers, DCA cashiering, and accounting divisions. Provide customers with direction using the guidelines of the appropriate laws, regulations, SAM Manual, policies, procedures, and management memorandums.

F. Actions and Consequences

Failure to follow proper guidelines from the State Administrative Manual, and or any other control agency rules and guidelines may result in litigation issues for the board. Failure to process documents in a timely manner may result in loss of mission critical processing and will result in loss of revenue for the State of California.

G. Functional Requirements

The Office Technician works 40 hours a week in an office setting with artificial light and temperature control. The incumbent must constantly operate a computer and other office productivity machinery, such as a calculator, copy machine, 10-key adding machine and a computer. The incumbent will be using stamping machines and staple removers for long periods of time, positioning self to move to retrieve files and occasionally move up to 20-pound boxes. The hours for this position are 8:00 a.m. to 5:00 p.m.

H. Other Information

As an employee of the Administration Division, this position requires confidentiality and discretion due to the sensitivity of the documents handled. Incumbent must keep current on control agency and departmental requirements such as SAM Manual, General Accounting Practices, Government Codes, and use knowledge of specific laws, policies and guidelines to determine the requirements, and legal impact of contractual agreements. Regular and consistent attendance is required.

**I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation.** (If you believe a reasonable accommodation is necessary, discuss your concerns with the hiring manager/supervisor. If unsure of the need for reasonable accommodation, inform the hiring manager/supervisor, who will discuss your concerns with the Health and Safety Analyst.)

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Employee Signature

Date

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Employee's Printed Name, Classification

**I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.**

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Supervisor Signature

Date

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Printed Name, Classification

**Approved: 9/2022 JM**