



# Duty Statement

Classification: **Office Technician (General)**

Position Number: **275-312-1138-046**

HCM#: **1446**

Branch/Section: **Operations Support Services Division, Production Services & Support Section, Document Management Center Section, Document Management Center II Unit**

Location: **Sacramento, CA**

Working Title: **Document Management Technician/Backup Messenger**

Effective Date: **June 8, 2026**

Collective Bargaining Identifier (CBID): **R04**

Supervision Exercised:  **Yes**  **No**

Telework:  **Office-Centered**  **Remote-Centered**  **Not Eligible**

The Operations Support Services Division (OSSD) provides a variety of essential support services to the CalPERS Board, team leaders, and team members pertaining to the work environment and the day-to-day operational needs. OSSD includes mailroom and receiving services, copy and printing services, mass mailing, asset management, fleet management, forms management, imaging, records management, Board elections, facilities and building management, physical security, parking and rideshare, space planning, sustainability, emergency management and business continuity, coordination of notary public, merit award program, and contract and purchasing services.

Under the general direction of the Supervisor I, the Office Technician (General) provides mail processing and imaging services. Duties include, but are not limited to, the following tasks:

## Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

25%      Onsite<sup>1</sup>, prepares documents for scanning into the myCalPERS system as digital images for permanent and secure retention. Document preparation includes removing staples, paper/binder clips, repairing damaged documents, sorting them by category type, inserting separator sheets between each member document, and counting the total number of pages in each batch. Scans each document by feeding batches into a high-speed digital scanner,

ensuring that all documents have been imaged clearly, and submitting each batch to the CalPERS Scan application for indexing. Performs basic maintenance and cleans the digital scanners. Notifies team leader of any hardware or software issues related to the scanners.

- 15% Onsite, indexes documents using a personal computer (PC) with the Document Indexer application to associate each document with the member's identification number (CalPERS I.D. or Social Security Number) in the myCalPERS system and selects a document type from a drop-down menu on the Document Indexer application. Processes DMC mailbox requests by CalPERS team members to obtain hardcopy files from off-site storage (State Records Center) or notification requests for correcting indexed documents within the ServiceNow application. Emails correspondence to CalPERS team members regarding the mailbox request, as appropriate.
- 15% Onsite, provides incoming mail processing services (receives, opens, date stamps, and sort document by form number/type, and division) for the CalPERS organization. Distributes previously sorted incoming and inter-departmental mail to the appropriate divisions daily using a mail delivery cart. Collects outgoing mail, documents, and recycled batteries from each division, in boxes, tubs, and containers weighing up to 50 pounds, at each mail stop.
- 15% Onsite, on a daily basis, picks up mail items throughout the CalPERS Headquarters campus for the morning and afternoon messenger service delivery to various State agencies such as the State Controller's Office, State Capitol, State Treasurer, Department of Finance, California Department of Human Resources, etc. driving a State vehicle. Utilizes a hand cart to pick up and transport mail items. Utilizing a State vehicle, picks up incoming mail from the United States Post Office and delivers it to the Document Management Center (DMC) for processing. Utilizes a hand cart when transporting mail, documents, and stationary items. Lifts and carries a variety of cartons, packages, and materials of various weights and sizes (including packages weighing up to 50 pounds). Always maintains messenger vehicle in clean and operable working condition and immediately informs team leader of any mechanical, safety, or other issues involving vehicle operation. Operates x-ray scanning equipment to inspect all incoming envelopes/packages prior to processing and distribution.
- 15% Onsite, provides assistance with mailing and receiving envelopes/packages to both internal and external customers at the DMC public counter. Enters data into an Excel spreadsheet for all envelopes/packages sent or received via FedEx, other express mail carriers, and certified mail. Notifies CalPERS team members when envelopes/packages are received. Moves packages weighing up to 50 pounds. Processes incoming checks received through the incoming mail from CalPERS members and employers by entering check information into an Excel spreadsheet. The Excel spreadsheet is verified for accuracy by a team leader or training analyst. Delivers the checks with completed Excel spreadsheet to the Financial Reporting and Accounting Services Division as priority workload four times daily. Provides micrographic support to CalPERS team members.
- 10% Onsite, uses myCalPERS system to research member information. Provides training to entry-level team members, as needed, regarding the DMC work processes and standards. Utilizes DMC policies and procedures regarding storage of hard copy confidential documents. Retrieves and counts all incoming documents throughout the day and informs team leader of the day-end inventory and provides written documentation. Performs quality control checks on

document batches prepared by other team members to ensure that each document batch is correct and error-free. Prior to the original paper documents being confidentially destroyed, quality control checks are performed to ensure the image is clear and complete. Moves boxes of documents, weighing up to 50 pounds, and transfers them into large bins for confidential destruction.

5% Onsite, performs other duties, special projects, and assignments as required and appropriate for this classification.

### **Working Conditions**

- <sup>1</sup> This position is not eligible for telework and the duties above will be performed onsite at CalPERS Headquarters in Sacramento, CA, five days a week.
- Work in a high-rise building.
- Work in a noisy environment with varying temperatures.
- Work with and/or move heavy objects.
- Prolonged periods of standing, sitting, bending, stooping, or kneeling.
- Ability to use a computer keyboard and read from computer screens several hours a day.

### **Conduct, Attendance and Performance Expectations**

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance).
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

**Employee Name (Print):**

**Employee Signature:** \_\_\_\_\_ **Date:**

I certify that the above accurately represent the duties of the position.

**Supervisor Signature:** \_\_\_\_\_ **Date:**