

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Office Technician (Typing)	OFFICE/BRANCH/SECTION Human Resources/Office of Transactions Services	
WORKING TITLE Clerical Support Staff Office Technician	POSITION NUMBER 702-008-1139-924	REVISION DATE

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under the general direction of the Branch Chief, a Supervisor I in the Office of Transactions Services (OTS), the Office Technician (OT) (Typing) is part of a clerical support pool responsible for performing a variety of general office duties within the OTS. The OT is expected to consistently exercise a high degree of initiative and independence and be able to complete tasks with minimal supervision or review of work. The OT will be flexible in accommodating changing workload priorities as needed to assist areas within OTS. The OT will perform filing, logging, and general clerical work. The OT demonstrates a positive attitude and a commitment to provide quality service that is accurate, timely and exceeds our customers' expectations.

CORE COMPETENCIES:

As an Office Technician (Typing), the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Cultivate Excellence - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence - Innovation)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Strengthen Stewardship and Drive Efficiency - Integrity)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Cultivate Excellence - Integrity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Cultivate Excellence - Engagement)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Cultivate Excellence - Pride)
- **Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Strengthen Stewardship and Drive Efficiency - Integrity)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
35%	Alphabetize, file, retrieve, and maintain employee documents and records in the Official Personnel Files ensuring security and integrity of files; provide files and copies of files on a timely basis to Division staff as requested; file documents including but not limited to probation and annual performance reports, Merit Salary Adjustment (MSA) notices, Notice of Personnel Action (NOPA) reports, benefit forms, new hire forms, training certificates, garnishments, Non-Industrial Disability (NDI), State Disability Insurance (SDI), catastrophic leave, keyed documents; and assist in the archiving process by gathering documents and/or files.

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30%	As a shared task with other OTs, maintain accurate logs using Microsoft Excel or other databases and distribute incoming NDI, SDI, garnishments, Personnel Action Request Forms (PARFs), separation clearance checklists, out-of-class requests, open enrollment benefits, leave buy back and leave balance requests, notice of adverse actions and stipulations, and State Controller's Office error notices (dings). These documents are received via mail, email and/or fax.
10%	Prepare and distribute probationary date reports and MSA notices to program managers and supervisors using email or inter-office mail; mail NOPAs and salary advance and accounts receivable notices to employees.
10%	Assist in the mail room by opening, date stamping and distributing mail to all OTS staff, which may include scanning and uploading to shared drives.
10%	Assist management in the selection process of OTS staff by preparing interview packets, scheduling interviews, and preparing and distributing new hire packets; update packet documents and packet listing as needed and ensure sufficient supplies are available.
5%	May assist with general clerical duties, such as copying, filing, printing, and mailing.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Must have knowledge of modern office methods, supplies and equipment; business English and correspondence; and principles of effective training. Must possess good organizational skills and have the ability to perform difficult clerical work, including ability to spell correctly; use good English; make arithmetical computations; operate various office machines and computer programs such as Microsoft Word and Excel; 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 using a wide knowledge of vocabulary, grammar and spelling; communicate effectively; provide functional guidance.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Incorrect information provided to the public and Department employees may damage the Department's credibility. Incorrect information to employees could have a serious impact on their employment benefits.

Responsible for complying with the Information Practices Act (IPA), Civil Code section 1798, et seq., by protecting departmental employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employee's confidential information may damage DHR's reputation as a confidential organization and result in employee grievances or lawsuits. Intentional violation of this Act may result in disciplinary action, up to and including termination of employment.

PUBLIC AND INTERNAL CONTACTS

Provides customer service to internal Caltrans customers and the public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and monitor. Employee must respond appropriately to situations. Employee may need to lift, kneel, stoop, and bend.

WORK ENVIRONMENT

In office, the incumbent will use a cubicle space in a climate-controlled office setting with artificial lighting, which may have limited viewing access to outdoors. At the direction of management, there may be a combination of telework/in-office hours. The incumbent may occasionally take transportation (car, light rail, bike, walk, or other mode of locomotion) to other State facilities for training and meetings.

ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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