

Duty Statement Rank and File

Section I

POSITION INFORMATION

Print or type.

A. Current Position Number	B. Probationary Period /JEP Period	C. Form 700 Filer?
785-557-5157-600		No
D. Incumbent Name	E. Classification/Job Title	F. Date of Hire
	Analyst I/Customer Service and Administrative Support Analyst	
G. Unit, Section, Division	H. Location	
Public Area, Political Reform Division	Sacramento	
I. Name of Immediate Supervisor/Manager	J. Classification/Title of Immediate Supervisor/Manager	
Chris Fultz	Supervisor I	
K. CBID (Bargaining Unit)	L. Time Base	M. Tenure
R01	Full Time	Limited Term
N. Work Schedule	O. Work Hours	P. Telework
Monday – Friday	8:00am – 5:00pm	100% In-Office
Q. Background Check Required	R. Job Requires Driving Automobile	S. Certification Required
☐ Yes	☐ Yes	☐ Yes Click here to enter text.
☒ No	☒ No	☒ No

Section II

JOB DESCRIPTION

Indicate the major functions and associated duties, and the percentage of time spent on each (list higher percentages first). Essential functions assigned less than 5% should be combined with other task statements. The total percentage of all functions, including marginal, must equal 100%.

DESCRIBE THE ORIGINAL SETTING AND MAJOR FUNCTIONS

The Secretary of State's Office, Political Reform Division, is replacing the California Automated Lobbyist and Campaign Contribution and Expenditure Search System (CAL-ACCESS) and requires multiple limited-funded positions to support business needs. The funding for this position is granted annually and is currently established through June 30, 2027. Funding in future years is contingent upon budget approval. This position may become permanent.

Under the general direction of a Supervisor I, this position is responsible for a wide variety of increasingly complex and analytical tasks associated with the processing and review of registration and disclosure documents filed under the campaign and lobbying provisions of the Political Reform Act.

This position requires moderately complex problem solving; having the ability to train and lead staff; writing procedures and manuals; analyzing data; testing; writing and reading reports; analyzing and improving workflow performance; developing, explaining, and presenting analytical reports to various audiences; updating databases; and providing testing services, logging, processing, and verifying data in CAL-ACCESS.

The incumbent will maintain regular and consistent attendance. The work is performed in an indoor office setting and requires the incumbent to have knowledge of office methods and procedures and have the ability to operate standard office equipment, type, sit, stand, and/or walk. This position is not eligible for telework.

ESSENTIAL FUNCTIONS

Percentage	Description of Duty
35%	Clerical and accounting. Performing tasks such as alphabetizing, logging, data entry, assembling file folders and filing documents. Creates receipts, takes payments, reconciles check logs and accountability reports; assists in the production of expenditure reports; and updates written correspondence. Authors and updates procedure documents, analyzes data, generates reports and workflow statistics. Creates and presents recommendations to management regarding procedures and manuals. Actively participates within a collaborative team setting and provides support to other areas as needed. Use technical skills to redact sensitive personal information from public filings as needed.
35%	Customer Service. Utilizes communication and judgement skills to advise and assist clients in person, over the telephone, and through written correspondence concerning campaign and lobbying registration and disclosure requirements. Reports and resolves common problems and issues while keeping management informed. Assists customers to complete various form fields, understand reporting periods and filing due dates, statutory penalties for violations, and options to submit filings. Assists staff in performing major and urgent work tasks to assure the continuity and timely completion of program services.
20%	Reviewing and organizing files. Assists in the biennial transfer of campaign and lobbying records to the State Archives and the State Records Center; participates in the periodic transfer of terminated Statements of Organization to the State Records Center.

MARGINAL FUNCTIONS

Percentage	Description of Duty
10%	Supports the CAL-ACCESS Replacement System project with tasks such as testing new features. Performs other duties as assigned.

The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned that fall within their classification, including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise balance the workload.

Section III

EMPLOYEE/SUPERVISOR STATEMENT

EMPLOYEE'S STATEMENT: I HAVE READ AND UNDERSTAND THE DUTIES, RESPONSIBILITIES, AND PERFORMANCE EXPECTATIONS OF THE POSITION AND DISCUSSED WITH MY SUPERVISOR. I HAVE RECEIVED A COPY OF THE DUTY STATEMENT.

I CAN PERFORM THE ESSENTIAL FUNCTIONS OF THE POSITION WITH OR WITHOUT REASONABLE ACCOMMODATION: (If you believe reasonable accommodation is necessary, please initiate a discussion with either your supervisor or the Secretary of State's Human Resources Bureau).

EMPLOYEE NAME (PRINT FULL NAME)	EMPLOYEE SIGNATURE	DATE SIGNED
➡	➡	➡

SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THIS POSITION WITH THE EMPLOYEE.

SUPERVISOR NAME (PRINT FULL NAME)	SUPERVISOR SIGNATURE	DATE SIGNED
➡Chris Fultz	➡	