



# DUTY STATEMENT

## INFORMATION TECHNOLOGY SPECIALIST I

### DOMAIN: BUSINESS TECHNOLOGY MANAGEMENT

#### OUR VISION

Every Californian can build a thriving life in a stable home

#### OUR MISSION

Deliver reliable financing solutions to advance housing opportunities for Californians

#### EMPLOYEE INFORMATION

|                                                                                         |                             |                                                                             |                            |                              |
|-----------------------------------------------------------------------------------------|-----------------------------|-----------------------------------------------------------------------------|----------------------------|------------------------------|
| Employee Name                                                                           |                             | Effective Date                                                              |                            |                              |
| Classification<br><b>Information Technology Specialist I</b>                            |                             | Position Number<br><b>693-001-1402-901</b>                                  |                            |                              |
| Division/Section/Unit<br><b>Single Family Division/Program and Systems Support Unit</b> |                             |                                                                             |                            |                              |
| CBID<br><b>R01</b>                                                                      | Work Week Group<br><b>2</b> | Location<br><b>Sacramento, CA</b>                                           | Tenure<br><b>Permanent</b> | Time Base<br><b>Fulltime</b> |
| Immediate Supervisor                                                                    |                             | Supervisor Classification<br><b>Housing Finance Officer (Single Family)</b> |                            |                              |

#### CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS

This position requires the incumbent to maintain acceptable, consistent, and regular attendance; communicate effectively orally and in writing in dealing with the public and/or other employees; develop and maintain knowledge and skills related to the position's specific tasks, methodologies, materials, tools, and equipment; complete assignments in a timely and efficient manner; and adhere to the Agency's policies and procedures regarding attendance, leave, and conduct.

#### **2 CCR § 172 – General Qualifications, states in pertinent part:**

The incumbent is expected to possess the general qualifications of integrity, honesty, sobriety, dependability, industry, thoroughness, accuracy, good judgment, initiative, resourcefulness, courtesy, ability to work cooperatively with others, willingness and ability to assume responsibilities and to conform to the conditions of work characteristic of the employment, and a state of health, consistent with the ability to perform the assigned duties of the class.

#### DIVISION DESCRIPTION

The California Housing Finance Agency's (CalHFA) Single Family Division works to help low to moderate-income homebuyers purchase homes in California through financing of first mortgages and down payment assistance. The Division also works with lending partners, municipalities, and others in the private and public sectors to facilitate homeownership. The Program and System Support Unit is responsible for providing support to users of custom application software as well as third-party vendor applications.

#### POSITION DESCRIPTION

Under the direction of the Housing Finance Officer (Single Family), the Information Technology (IT) Specialist I serves as a lead in solving organizational information problems and requirements through comprehensive analysis, innovative problem-solving skills, providing recommendations and implementing solutions to improve system controls and protocols.

The duties contained in this job description reflect general details a necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. The incumbent of this position may perform other duties, commensurate with this classification, as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or to otherwise balance the workload. The duties and responsibilities include, but are not limited to the following:

| Employee Name                                                                           | Classification<br><b>Information Technology Specialist I</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Division/Section/Unit<br><b>Single Family Division/Program and Systems Support Unit</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| PERCENTAGE OF TIME                                                                      | ESSENTIAL FUNCTIONS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 30%                                                                                     | <p><b>Business Analysis</b></p> <p>Responsible for the analysis and support of new organizational projects that requires review, assessment, and development of business processes, requirement gathering, and reporting. Acts as a lead in supporting the business and users by managing the existing databases. Identifies operational objectives by reviewing business functions, gathering information, evaluating output requirements, and monitoring project progress. Develops and recommends solutions and present findings to business owners. Serves as a technical lead for the agency's project requirements by defining project milestones, phases, and key elements for the development of business requirements. Develops comprehensive business requirements to help identify potential risks and efficiently track the project's timeline. Maintains system protocols by writing and updating procedures to help streamline workflows and provide guidance to new staff. Maintains user documentation to provide updated system guidelines and references to users. Ensures that an application or system's behavior maintains consistency with the written requirements by conducting tests to determine the overall quality of software applications. Creates test scripts for Mortgage Assistance Corporation (MAS) testing and all Single Family Division applications to help detect anomalies. Serves as the lead to provide support for all systems, maintaining knowledge of the current processes of each unit within the Single Family Division (Loan Production, Loan Administration, and Secondary Marketing). Recommends and provides system enhancement solutions to business owners by analyzing requirements, constructing workflow charts and diagrams, assessing system capabilities, and writing specifications to help improve system performance. Collaborates and consults with IT Developers, System Test Analysts, Subject Matter Experts (SME), Fiscal Services, third party vendors and Financing Divisions to support system improvements and business needs. Provides lead-level guidance in identifying and analyzing business and technical change requirements. Supports organizational and business initiative by recommending appropriate system controls and protocols to address evolving information needs.</p> |
| 30%                                                                                     | <p><b>System Analysis &amp; Administrator</b></p> <p>Assumes lead responsibilities for the TRUE Applications by working with vendors and IT staff on new loan products and documents to ensure all systems are programmed and trained to read and recognize the documents properly, extracting data fields, creating deficiency reports, and comparing data extracted to the MAS database on a per loan basis. Serves as a technical lead to work with the Business Unit on system issues and problems, creating and updating new process flows to improve and maintain streamlining processes. Performs hardware and software testing follow-ups and coordinates releases protocols for any fixes or new designs to ensure system efficiency and accuracy before deployment in alignment with organizational requirements. Responsible for mentoring existing Business Analyst team.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 20%                                                                                     | <p><b>End User Support and System Maintenance</b></p> <p>Functions as the designated lead to support applications in production by monitoring the Systems Support Unit shared email, as needed, to address and answer technical questions, troubleshoot problems, research root causes, and support users on productive use of the software. Provides training to users on</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|------|
| Employee Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Classification<br><b>Information Technology Specialist I</b> |      |
| Division/Section/Unit<br><b>Single Family Division/Program and Systems Support Unit</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| 15%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>system usage to ensure operational efficiency and employee productivity. Coordinates system resolution and initiates IT Support Tickets for changes needed to effectively upkeep and maintain various loan support systems such as Mortgage Access System (MAS), Loan Servicing Subordinate (LSS), Loan Servicing Subordinate-Keep Your Home CA(LSSK). Isolates long-term issues and production incidents to identify bugs and major system issues.</p> <p><b>Reporting</b></p> <p>Leads in the review, interpretation, and analysis of agency's collected borrower loan data using different tools, and statistical techniques, such as Microsoft Excel and data management systems, to provide accurate and reliable reports to various divisions and units throughout the Agency on an as-needed basis.</p> |                                                              |      |
| <b>PERCENTAGE OF TIME</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <b>MARGINAL FUNCTIONS</b>                                    |      |
| 5%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Participates in staff meetings, attends training, provides work status reports, and performs other required duties within the scope of the classification.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                              |      |
| <b>PERSONAL CONTACTS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <ul style="list-style-type: none"> <li>Daily contact with departmental managers, supervisors, staff at all levels, representatives from other State departments, members of the public, CalHFA approved lenders, Master Servicer, and Hedge Facilitator.</li> </ul>                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <b>SPECIAL REQUIREMENTS</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <ul style="list-style-type: none"> <li>N/A</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <b>WORK ENVIRONMENT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <ul style="list-style-type: none"> <li>Prolonged sitting</li> <li>Work in a high-rise building</li> <li>Use a computer keyboard and read from computer screens several hours a day</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <b>PHYSICAL ABILITIES</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <ul style="list-style-type: none"> <li>N/A</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <b>TRAVEL</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <ul style="list-style-type: none"> <li>Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <b>EMPLOYEE ACKNOWLEDGEMENT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <p>I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties as described above with or without reasonable accommodation. (If a reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with Human Resources.)</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| Employee Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Employee Signature                                           | Date |
| <b>SUPERVISOR ACKNOWLEDGEMENT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| <p>I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee with a copy of this duty statement.</p>                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                              |      |
| Supervisor Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Supervisor Signature                                         | Date |