

Duty Statement Rank and File

Section I**POSITION INFORMATION**

A. Current Position Number	B. Probationary Period/Job Evaluation Period	C. Form 700 Filer?
785-4XX-9928-XXX	6 Months	No
D. Incumbent Name	E. Classification/Job Title	F. Date of Hire
	Program Technician II	
G. Unit, Section, Division	H. Location	
Business Programs Division	Sacramento	
I. Name of Immediate Supervisor/Manager	J. Classification/Title of Immediate Supervisor/Manager	
TBD	Supervising Program Technician II	
K. CBID (Bargaining Unit)	L. Time Base	M. Tenure
R04	Full Time	Permanent
N. Work Schedule	O. Work Hours	P. Telework
Monday – Friday	8:00 AM – 5:00 PM	Hybrid
Q. Background Check Required	R. Job Requires Driving Automobile	S. Certification Required
☐ Yes	☐ Yes	☐ Yes
☒ 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

Under the general supervision of a Supervising Program Technician II or Supervising Program Technician III, this journey level position works with a degree of independence to provide a variety of technical services and is responsible for processing the more difficult program specialist work relating to the Business Programs Division. Functions include review and processing of various documents, filings and requests for compliance with legal requirements, data entry, quality and compliance assurance, customer account maintenance, reconciliation and deposit preparation tasks, and public contact/customer service. The incumbent exercises sound professional judgment and behavior; accepts responsibility for actions when completing tasks and must be capable of tactfully handling sensitive public contact, difficult questions, irate or dissatisfied customers and deal effectively with peers and superiors. The incumbent must develop and maintain a detailed knowledge of and the ability to interpret and apply various laws, rules and regulations and must have a thorough understanding of the Agency's policies and procedures.

ESSENTIAL FUNCTIONS

Percentage	Description of Duty
45%	<u>Technical Review & Responsibility</u> Reviews and/or examines the more difficult/more complex documents, filings and requests that may include financing statements, notary public applications, bonds, trademark and service mark registration and amendments, or Corporation and other business entity filings, and related documents, and authentication requests to ensure compliance with statutory or regulatory requirements. Makes determinations on the acceptability of the above referenced documents, filings, and requests. If the document, filing and/or request is determined to be non-compliant, communicates either verbally or in writing to the submitter the reason for rejection or need for correction. Acts as a knowledgeable resource on the above referenced documents, filings, and requests, and assists other Program Technician staff. Reviews images, film and paper documents, and inputs and retrieves information from electronic databases and other resources. Performs quality control by validating processed documents, filings and requests with corresponding database records; and other related activities. Processes requests, generates appropriate correspondence, and provides status information on filings in the custody of this office. References various California codes and interprets applicable code sections regarding the review process for various documents, filings and requests. Makes independent judgments based on statutory provisions of applicable California codes and regulations; makes careful analysis and performs the more difficult technical functions related to these filings. Balances cashiering receipts, prepares daily deposits and reconciles accounting reports using the automated accounting system; mails out requested forms and samples.
45%	<u>Customer Service and Correspondence</u> Interacts professionally with customers at the public counter, by telephone and/or email regarding the more difficult inquiries, information, documents and fees received. Accepts documents, filings, requests and/or fees received at the counter, provides customers with appropriate information based on a variety of sources, including applicable codes and statutes, current office procedures, and informational pamphlets issued by the Division. Transfers calls, as needed according to established procedures. Interprets laws and maintains familiarity with applicable codes, regulations, division policies and procedures pertaining to various filings, documents, liens, applications and requests when responding to public inquiries. Utilizes the computer system and attached devices as applicable. Researches and responds to customer inquiries by mail, telephone or email, and refers the most difficult correspondence to the supervisor, analyst, or manager.
5%	<u>Public Contact and Outreach</u> Confers with and coordinates public requests for information with other governmental agencies, non-governmental groups, professionals including attorneys and accountants, Secretary of State staff and the general public to provide information regarding customer requests and Business Program documents, filings or applications.

MARGINAL FUNCTIONS

Percentage	Description of Duty
5%	<u>Administrative Tasks</u> As needed, retrieves microfilmed records or other hard copy files for review process. Assembles correspondence for mailing to customer and performs other duties as required.

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
➡	➡	➡