

Duty Statement

Supervisory

Section I**POSITION INFORMATION**

A. Current Position Number	B. Probationary Period /Job Evaluation Period	C. Form 700 Filer?
785-403-9925-XXX	12 Months	No
D. Incumbent Name	E. Classification/Job Title	F. Date of Hire
	Supervising Program Technician II	
G. Unit, Section, Division	H. Location	
Notary Section, Business Programs Division	Sacramento	
I. Name of Immediate Supervisor/Manager	J. Classification/Title of Immediate Supervisor/Manager	
TBD	Supervising Program Technician III	
K. CBID (Bargaining Unit)	L. Time Base	M. Tenure
S04	Full Time	Permanent
N. Work Schedule	O. Work Hours	P. Telework
Monday – Friday	8:00 AM – 5:00 PM	100% In-Office
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 direction of the Supervising Program Technician III and/or Supervisor I, this second supervisory level position works with a high level of independence and trains, plans, organizes and directs the work of a moderate sized staff comprised primarily of Program Technicians II; and may also include Program Technicians, Office Assistants and/or Temporary Help; and personally performs the most complex work. The incumbent must develop and maintain a detailed knowledge of applicable laws, rules and regulations and of the department policies and procedures; as well as knowledge of other sections/divisions within the Secretary of State and other agencies for referrals when necessary. The incumbent must be capable of tactfully handling sensitive public contact, difficult questions, irate or dissatisfied customers and deal effectively with subordinates, peers and superiors.

This position performs tasks which have access to criminal history. Therefore, due to the nature of work performed, the incumbent must complete a background check.

ESSENTIAL FUNCTIONS

Percentage	Description of Duty
45%	<u>Program Management</u> Directs, monitors and evaluates the work of the staff and maintains performance standards within the unit. Ensures that priorities and goals are accomplished and assignments are properly completed. The incumbent must be knowledgeable of all facets of the operation of the unit. Frequently interacts professionally with the public, via telephone, mail, email and in person regarding business filings requirements, statutory and regulatory provisions, departmental policies, procedures, business statuses, information requests, difficult questions, general inquiries and escalations. Trains new employees on the office procedures and statutory filing requirements. Oversees the operation of the staff that is responsible for the unit activities. These activities may include, but are not limited to: answering by telephone, mail or in person inquiries regarding filing requirements, notary commissions, authentication requests, domestic partnerships, liens, trademarks, immigration consultants, business formations, expedites ; assisting customers with filings, requests; providing status information on various documents in the custody of this office; completing initial review and preliminary preparation of all documents; reviewing documents to ensure the documents meet statutory filing requirements and preparing rejection and correction letters for documents that do not meet those requirements; navigating the computer systems to accurately enter specific information and completing various other functions on the computer; certifying copies, sorting, counting and typing of logs, lists or cards for filed documents; maintaining microfilm/hard copy files and purging obsolete records; logging all filed documents and checks; balancing cashiering receipts, preparing daily deposits and reconciling accounting reports for the automated accounting system; mailing out requested forms and samples; opening and distributing mail. Provides operational support as needed to maintain continuity of unit operations, meet workload demands, and ensure timely customer service. This may include performing unit functions, including public-counter coverage, during periods of increased workload, staffing shortages, employee breaks, or other operational needs.
25%	<u>Personnel Relations</u> Ensures that employees abide by the Agency and Division policies and procedures, civil service practices and policies, and the mission of the Secretary of State's office. Maintains accurate attendance records; identifies and discusses employee attendance concerns with the Supervising Program Technician III and/or Supervisor I; schedules counseling meetings; prepares memos and disciplinary actions; and addresses complaints as they arise. Conducts employee evaluations, initiates letters of commendation, and schedules meetings with employees to encourage, motivate, and to provide opportunities for individual development. Coaches and develops staff by establishing clear performance expectations, providing ongoing feedback, recognizing effective performance, and promoting the timely completion of accurate, high-quality work consistent with unit and organizational goals. Reviews and approves Automated Request Tracking System (ARTS) requests for Personnel Action forms and timesheets.

10%	<u>Coordination & Outreach</u> Prepares technical responses to difficult and sensitive correspondence where research, analysis and interpretation of statutes or regulations are needed. Performs sensitive, difficult and complex assignments, taking the most difficult and complex to the Supervising Program Technician III and/or Supervisor I. Assists staff with the resolution of difficult issues and personally handles the sensitive complex situations. Keeps Supervising Program Technician III and/or Supervisor I apprised of any situation that must be monitored.
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MARGINAL FUNCTIONS

Percentage	Description of Duty
10%	<u>Operational Review</u> Monitors equipment and assists the Supervising Program Technician III and/or Supervisor I with evaluating the need for new equipment and the specifications necessary. Prepares weekly and monthly activity reports summarizing the unit's workload statistics and oversees records maintenance. Works with Supervising Program Technician III or analyst in the initial preparation and modification of forms and assists in modifying, revising and storing of forms and documents.
10%	<u>Administrative</u> Participates in the scheduling and interviewing of candidates to fill vacancies within the division and makes recommendations on the selection of staff. Oversees office supply orders and orders for repair service of equipment. May voluntarily participate in California Secretary of State Pop-Up Shop events to support program operations and provide in-person services to businesses and communities throughout the state. Voluntary participation may require occasional travel by various modes of transportation. 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
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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 ☐ No	☐ Yes ☒ No	☐ Yes ☒ No

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20%	<u>Personnel Relations</u> Ensures that employees abide by the Agency and Division policies and procedures, civil service practices and policies, and the mission of the Secretary of State's office. Is responsible for maintaining accurate attendance records, identifying and discussing with the Supervising Program Technician III and/or Supervisor I employee attendance problems, scheduling counseling meetings with employees, preparing memos and disciplinary actions and handling complaints as they arise. Conducts employee evaluations, initiates letters of commendation, schedules meeting with employees to encourage, motivate and to provide opportunities for individual development. Reviews and approves Automated Request Tracking System (ARTS) requests for Personnel Action forms and timesheets.
10%	<u>Coordination & Outreach</u> Prepares technical responses to difficult and sensitive correspondence where research, analysis and interpretation of statutes or regulations are needed. Performs sensitive, difficult and complex assignments, taking the most difficult and complex to the Supervising Program Technician III and/or Supervisor I. Assists staff with the resolution of difficult issues and personally handles the sensitive complex situations. Keeps Supervising Program Technician III and/or Supervisor I apprised of any situation that must be monitored.

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10%	<u>Administrative</u> Participates in the scheduling and interviewing of candidates to fill vacancies within the division and makes recommendations on the selection of staff. Oversees office supply orders and orders for repair service of equipment.
5%	Performs other duties as required.

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EMPLOYEE NAME (PRINT FULL NAME) ➡	EMPLOYEE SIGNATURE ➡	DATE SIGNED ➡
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SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THIS POSITION WITH THE EMPLOYEE.

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