

DUTY STATEMENT

OFFICE TECHNICIAN (TYPING) – SPANISH BILINGUAL

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 Office Technician (Typing)		Position Number 693-001-1139-901		
Division/Section/Unit Single Family Division/Loan Administration Unit				
CBID R04	Work Week Group 2	Location Sacramento, CA	Tenure Permanent	Time Base Full-Time
Immediate Supervisor			Supervisor Classification Housing Finance Officer (Single Family)	

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 Single Family Division's primary purpose is to work with CalHFA-approved lenders to help low and moderate-income first-time homebuyers purchase their first home. Other units within the CalHFA Single Family Division train loan officers, develop relationships with lenders, and work to approve new lenders.

POSITION DESCRIPTION

Under direction of the Housing Finance Officer (Single Family), the Office Technician (Typing) performs a variety of clerical duties related to the servicing of CalHFA subordinate loans to support the operations of the Single Family Loan Administration Unit, including Keep Your Home California.

The duties contained in this job description reflect general details 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, in line 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 also include, but are not limited to the following:

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PERCENTAGE OF TIME	ESSENTIAL FUNCTIONS	
50%	Customer Service Answers, returns, and documents telephone calls requesting information or inquiring about subordinate liens from borrowers, third parties, general public, and escrow/title companies in Spanish and English. Translates and writes correspondence to and from borrowers in English and Spanish. Documents the Loan Servicing Subordinate (LSS) System by inputting the loan number, borrower name, or address to access the borrower's account, and providing detailed notes of the conversation from the borrower or authorized third party. Processes the payoff requests, assigned from the Subordinate Loans email inbox and the fax queue or requested from borrower/title. Verifies requests for completeness and sends through the LSS system and/or via mail.	
35%	Mail and Records Management Assists with opening, date stamping, sorting, and distributing mail to division staff. Verifies borrower information from received W9's in the LSS system before transferring them to the Mortgage Electronic Registration System (MERS) contact in the production unit or SharePoint upload. Assists with return mail (welcome letters, reminder letters, W9's, year-end statements, loan documents, etc.) by identifying updated addresses for subordinate liens. Follows set procedures for updating mailing address. Updates the LSS system with the new information and resends the mail or prepares for scanning after documenting. Inputs recorded Deed(s) of Trust into the LSS system, generates header sheets, and uploads copies to SharePoint. Inputs recorded reconveyances into the LSS system, makes copies, generates header sheets, sends the original recorded reconveyance to the borrower through US mail, and uploads the copies to SharePoint. Provides back up for sending notes to accounting by reviewing notes to ensure property address, borrower, name and loan amount are accurate. Inputs and files purchase note entries, organizes related documentation, and prepares a report for the accounting team outlining loans scheduled for purchase.	
10%	Subordinate Lien and Default Tracking Reports and tracks the Notice of Defaults (NOD) and Notice of Sales (NOS) on subordinate liens in an Excel spreadsheet. Provides tracking report to appropriate staff. Requests loan files and distributes them to appropriate staff.	
PERCENTAGE OF TIME	MARGINAL FUNCTIONS	
5%	Prepares letters, forms, and other documents in Microsoft Word and Excel. Participates in trainings, attends staff meetings, handles special projects, and performs other duties as required within the scope of the assigned classification.	
PERSONAL CONTACTS		
Daily contact with all levels of departmental staff, borrowers or third parties, and members of the public.		
SPECIAL REQUIREMENTS		
- Spanish bilingual speaking, reading, and writing - Typing Certification		
WORK ENVIRONMENT		
- Prolonged sitting - Works in a high-rise building - Uses a computer keyboard and reads from computer screens several hours a day		
PHYSICAL ABILITIES		
Ability to transport up to 20 lbs.		

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TRAVEL			
Occasional travel may be required within the state of California via private or public transportation (i.e., automobile, airplane, etc.)			
EMPLOYEE ACKNOWLEDGEMENT 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.)			
Employee Name		Employee Signature	Date
SUPERVISOR ACKNOWLEDGEMENT 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.			
Supervisor Name		Supervisor Signature	Date