



DUTY STATEMENT MANAGEMENT SERVICES TECHNICIAN 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 Management Services Technician		Position Number 693-001-5278-901	
Division/Section/Unit Single Family Division/Loan Administration		Location Sacramento, CA	
CBID R01	Work Week Group 2	Tenure Permanent	Time Base Fulltime
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 California Housing Finance Agency's (CalHFA) Single Family, Loan Administration Unit's primary purpose is to service subordinate loans and perform oversight for our outside servicers of first mortgages. Loan Administration provides customer service to borrowers seeking information pertaining to subordinate loans.

POSITION DESCRIPTION

Under supervision of the Housing Finance Officer (Single Family), the Management Services Technician (MST) performs a variety of duties related to the servicing of CalHFA's subordinate loans and reconveyances to support the operations of the Single-Family Loan Administration Unit.

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:

PERCENTAGE OF TIME	ESSENTIAL FUNCTIONS
50%	<u>Customer Service</u>

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20%	Performs customer service duties including answering telephone inquiries for Loan Administration and Keep Your Home California (KYHC) borrowers and third parties requesting information on subordinate loans. Directs Agency inquiries to the appropriate department. Prepares and mails payoff demands and verification of mortgages to borrowers, escrow, and title companies upon request. Sends out loan documents (Note, Deeds of Trust, etc.) on paid in full loans to borrowers. <u>Default, Foreclosure, and Collections Monitoring and Processing</u> Reports and tracks the Notice of Defaults (NOD) and Notice of Sales (NOS) on subordinate liens received through Mortgage Electronic Registrations Systems (MERS) emails and regular mail in an Excel spreadsheet and provides tracking report to foreclosure staff. Reviews reports on paid in full first mortgages to determine if the subordinate loans are paid. If not paid, makes collection calls to borrowers and issues demand letters to borrower or pursues collection activity to avoid foreclosure. Sends proper notification to the borrower that CalHFA has demanded a payoff of a subordinate lien, and if the borrower does not respond as required, refers the file to the Trustee to initiate foreclosure.
15%	<u>Loan Administration Correspondence</u> Opens, identifies, date-stamps and distributes mail to appropriate staff, often researching to determine who the mail belongs to. Handles return mail (welcome letters, reminder letters, W-9s, year-end statements, loan documents, etc.) for subordinate mortgages by resending to forwarding address or locating a new address on the skip tracing system Eport. Updates subordinate loan system with new information, resends or prepares for scanning after documenting. Checks the electronic fax inbox for any faxes that have been received for distribution. Reviews and processes the expedited payoff requests and rename the file with the loan number to distribute to appropriate staff. Monitors, reviews, responds to, or distributes electronic mail from the Subordinate Loans email box.
10%	<u>Loan Production Correspondence</u> Acts as backup for sending promissory notes to the accounting department and opening production department through FedEx/UPS mail and inputting promissory note information into the Mortgage Access System (MAS) and filing them in the appropriate file cabinets.
PERCENTAGE OF TIME	MARGINAL FUNCTIONS
5%	Participates in training, attends staff meetings, handles special projects, and performs other duties as required within the scope of their current classification
PERSONAL CONTACTS	
Daily contact with departmental managers, supervisors, staff at all levels, representatives from other State departments, members of the public, borrowers and/or third parties.	
SPECIAL REQUIREMENTS	
Spanish bilingual speaking, reading and writing	
WORK ENVIRONMENT	
- Prolonged sitting - Work in a high-rise building - Use a computer keyboard and read from computer screens several hours a day	
PHYSICAL ABILITIES	
Be able to transport up to 20 lbs.	

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TRAVEL		
Occasional travel may be required within and/or outside 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