Form **DS-RF**
State of California
Secretary of State

Duty Statement
Rank and File

Section I **POSITION INFORMATION**

Print or type.

A. Current Position Number	B. Probationary Period/Job Evaluation Period	C. Form 700 Filer?
104-9928-001	6 Months	No
D. Incumbent Name	**E. Classification/Job Title**	**F. Date of Hire**
TBD	Program Technician II	TBD
G. Unit, Section, Division		**H. Location**
Legal Affairs Office, Executive Division		Sacramento
I. Name of Immediate Supervisor/Manager	**J. Classification/Title of Immediate Supervisor/Manager**	
Ted Muhlhauser	Supervisor II	
K. CBID (Bargaining Unit)	**L. Time Base**	**M. Tenure**
R04	Full Time	Permanent
N. Work Schedule	**O. Work Hours**	**P. Telework**
Monday – Friday	8:00am – 5:00pm	100% In-Office
Q. Background Check Required	**R. Job Requires Driving Automobile**	**S. Certification Required**
☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ 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 the Supervisor II and in conjunction with Legal Affairs Office attorney supervisors, 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 functions and operations of the Legal Affairs Office, including service of process and other work in support of Secretary of State (SOS) Divisions and Units. Functions include intake, processing and review of various documents, filings and requests for compliance with legal requirements; data entry; quality and compliance assurance; 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 while utilizing Microsoft Office suite, Adobe, proprietary agency computer applications, communications platforms and other systems as applicable.

ESSENTIAL FUNCTIONS

Percentage	Description of Duty
45%	**Technical Review & Responsibility** Reviews and/or examines the more difficult documents, filings and requests, which may include various forms of service of process, the Victims of Corporate Fraud Compensation Fund, business entity filings, matters that pertain to notaries public, including remote online notarization, and other agency filings and correspondence. Applies applicable statutory or regulatory requirements and established procedures to determine the acceptability of referenced submissions, documents, filings, and requests. Communicates either in writing or verbally to the submitter the reasons for rejection or need for correction. Refers questions regarding further legal interpretation to appropriate staff. Acts as a knowledgeable resource regarding documents, filings, requests, and correspondence, and assists other Legal Affairs staff. Reviews images, film and paper documents, and inputs and retrieves records or information from electronic databases and other resources. Performs quality control by validating processed documents, filings and requests against corresponding database records; and other related activities. Processes requests, generates appropriate correspondence, and provides status information on filings and other records in the agency's custody. References and applies various California codes and interprets applicable code sections regarding the review process for various documents, filings and requests. Exercises judgment based on statutory provisions of applicable California codes and regulations; performs the more difficult and technical functions related to these filings. Coordinates and assists with records retention.
45%	**Customer Service and Correspondence** Interacts professionally with internal and external customers via email, telephone and in-person, including at the public counter regarding standard and more difficult technical inquiries. Processes documents, filings, and/or requests received at the counter or online. Provides customers with information regarding filing requirements and procedures using applicable codes and statutes, current office procedures, and informational pamphlets issued by the Division. Confers with staff in other SOS Divisions, governmental agencies, non-governmental groups, professionals including attorneys and accountants, to obtain and provide information regarding customer requests and Business Program documents, filings or applications. Manages and coordinates various email and voicemail accounts. Transfers emails and calls, as needed, according to established procedures. Interprets and applies laws and maintains familiarity with applicable codes, regulations, division policies and procedures pertaining to various filings. Researches and responds to customer inquiries by mail, telephone or email, and refers the most difficult filings or correspondence to the appropriate examiner, analyst, supervisor, manager or attorney.

MARGINAL FUNCTIONS

Percentage	Description of Duty
10%	**Administrative Tasks, Special Projects and Other Duties as Assigned** As needed, assists the examiner, analysts, Supervisor II and attorney team with administrative tasks relating to office management. Assists in developing and updating procedure guides for supervisory review and performs records management actions in accordance with established procedures. May also coordinate or assist with administrative processing related to contracting,

	procurement, travel, expense claims, and personnel actions; assists with special projects related to operations of the Legal Affairs Office and other SOS Divisions; performs other duties consistent with the Program Technician II classification 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
➧	➧	➧