

VISTA UNIFIED SCHOOL DISTRICT

RECORDS TECHNICIAN

Purpose Statement

The purpose of a Records Technician is to provide specialized clerical duties in the organization, storage, retrieval, maintenance, and disposal of district records according to established guidelines; provide clerical assistance to the printing department; communicate information to staff and vendors; coordinate assigned projects and activities; and/or provide general support.

This job reports to the Executive Director of Fiscal Services.

Essential Functions

- Assists district staff regarding printing requisitions and cost estimates for the purpose of providing support for completing transactions, identifying appropriate actions, and/or complying with established procedures.
- Compiles financial information related to work assignments (e.g. printing requisitions, invoices, etc.) for the purpose of providing required documentation and/or processing information.
- Confirms retention period of records, makes recommendations for the approval of the destruction of specific records and files as appropriate, and arranges for the disposal of records for the purpose of assuring efficient use of storage space and destroying obsolete records in accordance with established administrative guidelines and legal requirements.
- Performs general clerical functions (e.g. scheduling, copying, scanning, faxing, data entry, filing, etc.) for the purpose of supporting department operations.
- Processes documents and materials (e.g. time sheets, work orders, requisitions, budget transfers, etc.) for the purpose of disseminating information in compliance with established administrative guidelines.
- Receives, purges, classifies, and maintains manual, microfilmed, and electronic documents, files, and records for the purpose of providing up-to-date information and/or historical reference and storing permanent records in an efficient and secure manner in accordance with established administrative guidelines and legal requirements.
- Researches and orders supplies, materials, and equipment for the purpose of maintaining availability of required items.
- Responds to inquiries from a variety of internal and external parties for the purpose of receiving and providing information.
- Retrieves archived manual, microfilmed, or electronic files upon request for the purpose of complying with requests from staff, students, courts, law enforcement agencies, or others according to established administrative guidelines and legal requirements.

Other Functions

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Job Requirements: Minimum Qualifications

Skills, Knowledge and Abilities

SKILLS are required to perform tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include:

- applying job-related codes, regulations, and laws;

- operating standard office equipment including pertinent software applications and office technology;
- performing arithmetic calculations and clerical duties with speed and accuracy;
- preparing and maintaining accurate records;
- using job-related software including word processing, spreadsheets, and database management.

KNOWLEDGE is required to:

- perform basic math, including calculations using fractions, percents, and/or ratios;
- read a variety of manuals;
- understand complex, multi-step written and oral instructions;
- speak clearly;
- solve practical problems.

Specific knowledge based competencies required to satisfactorily perform the functions of the job include:

- alpha and numeric filing techniques;
- business telephone and email etiquette;
- concepts of grammar, spelling, and punctuation;
- job-related codes/laws/rules/regulations/policies;
- keyboarding;
- methods of tactful, patient, and courteous interpersonal interactions;
- office equipment and technology;
- office practices and procedures;
- pertinent software programs;
- recordkeeping and record retention practices;
- safety and security practices.

ABILITY is required to schedule activities; collate data; and use basic, job-related equipment. Flexibility is required to work with others in a variety of circumstances; work with data utilizing defined and similar processes; and operate equipment using standardized methods. Ability is also required to work with a diversity of individuals; work with similar types of data; and utilize job-related equipment. Problem solving is required to identify issues and create action plans. Problem solving with data requires independent interpretation of guidelines; and problem solving with equipment is limited. Specific ability based competencies required to satisfactorily perform the functions of the job include:

- accuracy and attention to detail;
- adapting to changing work priorities;
- analyzing issues and determining appropriate course of action;
- classifying records and files;
- communicating with persons of diverse backgrounds;
- displaying tact and courtesy;
- establishing and maintaining effective working relationships with others;
- maintaining confidentiality;
- meeting deadlines and schedules;
- operating microfilm reader and printer;
- organizing tasks;
- reading, interpreting, explaining, and following rules, regulations, policies, and procedures;
- reading, writing, and communicating effectively in English;
- setting priorities and meeting deadlines;
- working as part of a team;
- working with detailed information/data.

Responsibility

Responsibilities include: working under limited supervision following standardized practices and/or methods; providing information and/or advising others; and tracking financial transactions. Utilization of some resources from other work units is often required to perform the job's functions. There is a continual

opportunity to have some impact on the organization's services.

Work Environment

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, frequent stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 40% sitting, 20% walking, and 40% standing. The job is performed in a generally hazard free environment.

Experience: Job related experience is required.

Education: High school diploma or equivalent.

Equivalency: High school diploma or equivalent and two (2) years of increasingly responsible clerical or records retention experience.

Retention: In accordance with Education Code 45301, an employee appointed to this class must serve a probationary period of one hundred thirty (130) days of paid regular service (excluding days absent for illness or injury) during which time an employee must demonstrate at least an overall satisfactory performance. Failure to do so shall result in the employee's termination.

Required Testing

For those candidates who meet the minimum qualifications, the assessment process will consist of any one or more of the following: Screening for most qualified candidates, Training and Experience Evaluation, a Written Test, a Performance Test, and/or a Qualifications Appraisal Interview.

Certificates and Licenses

Continuing Educ. / Training

Clearances

Fingerprint and Background Clearance
Drug Test
Tuberculosis Clearance

FLSA Status
Non-Exempt

Approval Date
Established: 08/09/2016

Salary Grade
Classified, Range 41