



Job Description

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job.

Job title	Records Management Technician I/II
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GENERAL PURPOSE

Under immediate (Records Management Technician I) or general (Records Management Technician II) supervision, provides support for the District's Records Management (RM) function; related duties including scanning, receiving, and maintaining retention of records, responding to Public Records Act Requests; performing professional and technical tasks in support of the District's RM program; creating and updating standard order procedures; and performs related duties, as assigned.

DISTINGUISHING CHARACTERISTICS

Records Management Technician I: This is the entry-level classification in the Records Management Technician series. Initially under close supervision, incumbents learn and perform routine records management duties involving the receipt, retention, and disposal of District documents and records. As experience is gained, assignments become more varied, complex, and difficult; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the Records Management Technician II level but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

Records Management Technician II: This is the fully qualified journey-level classification in the Records Management Technician series. Positions at this level are distinguished from the Records Management Technician I by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate (Records Management Technician I) or general (Records Management Technician II) supervision from the Records Management Supervisor/Contracts Specialist. Exercises no direct supervision over staff.

TYPICAL DUTIES AND RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this position.

Positions at the Records Management Technician I level may perform some of these duties and responsibilities in a learning capacity.

- Create standard order procedures, training videos, links, and procedure manuals in order to educate District staff regarding the utilization of the District's EDMS, Sharepoint Library, and proper scanning and indexing of documents for easy retrieval and retention.
- Assist in creation of electronic workflows for improvement with tracking, record management, and accessibility.
- Assist and support the process of digitizing records management and alongside information systems, proactively index to facilitate retrieval and maintaining of an accurate retention schedule.
- Scans, indexes, and codes District records into EDMS (and maintains in the Records Management vault); performs document searches in EDMS; duplicates and distributes copies of requested District records; scans large plans and maps; assists with the microfiche machine and printer as needed.
- Organizes, coordinates, and monitors the District's offsite-records storage program, including offsite record filing, retrieval, and destruction; and periodic audits of offsite file storage.
- Creates and maintains chronological files, file listings, indexes, and cross-references; maintains District contractual agreements and real property documents such as easements, deeds, and quit claims.
- Provides policy, procedural, and technical advice for enhancements to the District's records management programs, systems, and procedures; assists in conducting records management training for District staff.
- Observes and complies with all District and mandated safety rules, regulations, and protocols.
- Performs related duties as assigned.

REQUIRED QUALIFICATIONS

Positions at the Records Management Technician I level may exercise some of these knowledge and abilities statements in a learning capacity.

Knowledge of:

- Principles and practices of records management including records retention and disposal.
- Manual and computerized records and information management systems.
- Methods and techniques of document indexing and coding.
- Federal, state, and local laws, codes, and regulations in assigned areas of responsibility.
- District policy retention requirements.
- District and mandated safety rules, regulations, and protocols.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Develop and maintain complex record-keeping systems.
- Respond to requests and inquiries for information regarding records management.
- Train employees in the use of records and management program.
- Code, file, and retrieve a wide variety of materials under a comprehensive records management system.
- Follow and apply written and oral work instructions.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies, and procedures, and standards relevant to work performed.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Experience:

Any combination of experience and education that provides the required knowledge and abilities is qualifying, along with the specific licenses/certifications as outlined below:

- Records Management Technician I: Two (2) years of administrative experience maintaining complex records and legal documents, one (1) of which should be in a centralized records management program; public records management experience is desirable.
- Records Management Technician II: Four (4) years of progressively responsible administrative experience maintaining complex records and legal documents, or two (2) years of experience as a Records Management Technician I with the District.

Education:

- Records Management Technician I/II: Equivalent to completion of the twelfth (12th) grade.

Licenses/Certifications:

- None.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 40 pounds, or heavier weights, in all cases with the use of proper equipment and/or assistance from other staff.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

FLEX REQUIREMENTS

Positions in the Records Management Technician class series are flexibly staffed; positions at the Records Management Technician II level are normally filled by advancement from the Records Management Technician I level; progression to the Records Management Technician II level is dependent on (i) management affirmation that the position is performing the full range of duties assigned to the classification; (ii) satisfactory work performance; (iii) the incumbent meeting the minimum qualifications for the classification including any licenses and certifications; and (iv) management approval for progression to the Records Management Technician II level.

Eastern Municipal Water District
Job Title: Records Management Technician I/II
Last Update: March 2020

This job description has been reviewed and approved by all levels of management in cooperation with the union (if applicable):

Approved by:	<i>Board of Directors</i>
Date adopted:	<i>March 29, 2020</i>
Date modified:	
FLSA determination:	<i>Non-Exempt</i>

Job Description Acknowledgment

I have received, reviewed, and fully understand the job description for Records Management Technician I/II. I further understand that I am responsible for the satisfactory execution of the essential functions described therein, under any and all conditions as described.

Employee Name (print): _____ *Date:* _____

Employee Number: _____

Employee Signature: _____