

Department of Consumer Affairs

Position Duty Statement

HR-041 (new 5/04)

Classification Title Office Technician (General)	Board / Bureau / Division Contractors State License Board
Working Title	Office / Unit/Section / Geographic Location Administration / IWAS / Sacramento
Position Number 622-110-1138-999	Effective Date

General Statement:

The Office Technician (General) [OT (G)] will work under the general direction of the Office Services Supervisor II, direction and assignments may also come from the lead Associate Governmental Program Analyst and the Staff Services Manager I. The OT (G) works at the advanced journey level and will perform the most difficult duties related to the preparation, scanning, indexing, and quality control of documents for electronic imaging. The OT (G) duties include, but are not limited to:

A. SPECIFIC ACTIVITIES [Essential (E) / Marginal (M) Functions]

30% (E) PREPARING INCOMING MAIL FOR SCANNING/INDEXING:

Independently review and sort incoming mail to prepare like documents into batches for scanning/indexing into the Imaging Workflow Automation System (IWAS). Mail includes documents for Licensing's Applications, Bonds, Criminal Background, Family Support, Judgments, License Modification, Record Certification, Renewals, and Workers Compensation Units.

Conduct research using the Teale and IWAS computer systems to ensure the documents are prepped under the correct template, document type, and license/application number.

Use the copy machine, resize irregular sized documents to standard size and adjust the exposure of the text on the documents to ensure legible copies are scanned.

Utilize detailed knowledge of the Licensing Unit policies and procedures to determine whether documents need further review before scanning. If further review is necessary, delivers the documents to the appropriate unit or person for assistance.

Prepare older license file folder documents for scanning. Use extensive knowledge, gained from thoroughly reviewing and understanding the afore mentioned mail sorting process, to correctly read and interpret the document's content to identify the correct document type for scanning. The OT works independently, making it imperative to exercise accuracy and attention to detail with the file preparation.

Sort and count the Exam and Waiver unit applications, and enters the information onto Excel Spreadsheet. Deliver applications to the appropriate units for entering into the TEALE system.

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30% (E) SCANNING BATCHES OF DOCUMENTS INTO IWAS SYSTEM:

Perform quality control checks on all batches prior to scanning by verifying that the cover sheet correctly identifies the document type and template for the documents in the batch. Ensure all staples and paper clips are removed from the documents in order to prevent paper jams and /or damage to the scanner. Identify errors, taking the appropriate actions for making corrections.

Create the batch and scan the document into the IWAS system using the high speed scanning machine to convert the paper documents into electronic images for approximately 300 document types using 14 different templates.

Verify that each image scanned is legible and acceptable. In addition, verify that the count on the scanner matches the document count written on the batch cover sheet. If the batch counts do not match, resolves the issue by manually counting the documents in the batch to determine if the batch was incorrectly prepared or if a scanning error occurred.

30% (E) INDEXES SCANNED DOCUMENTS INTO THE IWAS SYSTEM:

Perform quality control checks on all scanned batches of documents to ensure they were scanned under the correct template, and the document cover sheet accurately identifies all documents in the batch.

Review, research, and resolve any missing or incorrect aforementioned information on the documents scanned using the CSLB computer system.

Index the documents by selecting the corresponding batch number in the imaging folder of scanned batches. Enter the unique identifier (license and/or application number), the date CSLB received the document, and the document type into the index entry fields for the imaged document captured.

Visually verify the information entered into the system is correct to ensure the document is accurately committed into the system.

File batches in the appropriate storage boxes after indexing for the required retention period.

10% (M) ADDITIONAL ASSIGNMENTS

Assist with the training of new employees and other less experienced staff members. Assist CSLB staff in other units regarding IWAS policies and procedures.

Follow detailed manual procedures to perform daily cleaning of the scanner. Perform amp gain adjustment on the scanner to calibrate the quality of the scanned image, and complete the scanner log. Open on-line help desk ticket with CSLB Technical Support Unit when scanner has an error code or does not perform.

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B. Supervision Received

The Office Technician reports directly to the Office Services Supervisor II. However, direction and assignments may also come from the lead Associate Governmental Program Analyst and the Staff Services Manager I.

C. Supervision Exercised

None

D. Administrative Responsibility

None

E. Personal Contacts

The Office Technician has daily contact with CSLB staff via telephone, computer, and in person within headquarters.

F. Actions and Consequences

Failure to maintain scanning equipment and accurately prepare, scan, and index documents could result in documents being misdirected or lost within the imaging system which could cause an interruption of services provided to CSLB programs and ultimately to the consumer and licensee. Accuracy is crucial to the operation of CSLB, primarily to the Licensing and Enforcement units. Error may result in litigation issues for the CSLB.

G. Functional Requirements

The Office Technician works 40 hours per week in an office setting, with artificial light and temperature control. The ability to use a personal computer, scanning equipment, and telephone is essential. This position requires bending and stooping to retrieve boxed documents; walking and lifting on a daily basis.

H. Other Information

As an employee of the Administration Division, this position requires discretion due to the confidential and private information in the documents handled. The ability to problem solve, prioritize workload, and work independently is required. Regular consistent and predictable attendance is required as well.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform your supervisor, who will discuss your concerns with the Health & Safety analyst.)

Employee Signature

Date

Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

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Supervisor Signature

Date

Printed Name

Revised: 05/2015

Approved: 06/04/2013 - JW