



**April 2011**

## **RECORDS MANAGEMENT SPECIALIST**

### **DEFINITION**

Under general supervision, coordinates and maintains the City-wide official records management program, imaging and records systems, and document retention, storage, and retrieval systems; evaluates department business and individual user's job responsibilities to configure, build and implement customized scanning sessions; creates workflows for departments or individual staff; provides information to the public and staff requiring knowledge of department services, policies, and procedures; provides assistance for a wide variety of assignments related to the administration of budgets, contracts, research projects, and department programs; and performs related work as required.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the City Recorder. Exercises no direct supervision over staff. May provide technical and functional direction to other administrative support staff.

### **CLASS CHARACTERISTICS**

This is a single-position class that is responsible for the coordination and maintenance of the City's official computerized and manual records management systems. Responsibilities include assisting with developing, implementing, and maintaining policies and procedures of records management systems, providing relevant information for City employees and the public. Incumbents are expected to work independently and exercise a high degree of independent judgment, tact, 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. This class is distinguished from the Information Technology Technician by the performance of complex technical and specialized records management duties.

### **EXAMPLES OF ESSENTIAL FUNCTIONS** (Illustrative Only)

*Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Maintains computerized and manual records management systems for the City's official documents, including the on-going design, implementation, and management of a City-wide imaging system.
- Participates in the development, implementation, and maintenance of policies and procedures for the recording, indexing, filing, and retrieving of active documents and the storage of inactive documents; assists in developing a work plan for the records management function and reviews, evaluates, and makes recommendations on work products, methods, procedures, and policies.

- Assists in reviewing and updating the City-wide records retention schedules and vital records, including working with outside agencies and staff to inventory records; updates retention schedule to reflect current legal requirements; provides for and administers the appropriate destruction of records.
- Coordinates requests for public records submitted within specific deadlines regulated by the State including receipt of request, distribution of request, and research; compiles and prepares for the release of the documents requested; provides files, photocopies, and microfilm copies; researches records to prepare reports and provides follow-up information to customer and staff inquiries, as well as schedules and coordinates for review of records.
- Coordinates the creation, maintenance, retrieval, protection, retention, and destruction of all records in accordance with City policy and legal, financial, governmental, and historical requirements.
- Provides technical direction to, trains, and evaluates the work performance of City volunteers to ensure office work flow is maintained and office goals are met; assigns work according to changes in workload priorities; evaluates office and administrative functions to recommend changes in office procedures.
- Maintains complex databases for tracking department projects, inventory of on-site and off-site records and other operational needs.
- Processes payments for records by cash, check, and credit card; balances payments in the City's accounting software.
- Participates in development of training materials, and assists in departmental and organization-wide training sessions on records management related topics and e-mail/internet policy.
- Communicates and ensures the compliance with the City's policies and procedures pertaining to the distribution of proprietary and confidential City information and documentation to the public, including the Identity Theft Protection Act and the City's policies and procedures regarding safeguards to ensure security, confidentiality, and integrity of information.
- Assists the public and City employees by providing information and research assistance regarding City records; responds to citizen and staff inquiries and complaints; serves as liaison to all departments on records management related issues.
- May participate in the preparation of department budget including gathering and analyzing data related to expenditures and projected charges; monitors budget expenditures; initiates department purchases for office supplies and other items as assigned.
- Composes, types, edits, and proofreads a variety of complex documents, including forms, memos, reports, statistical reports, and correspondence for department staff from rough draft, dictation equipment, handwritten copy, verbal instructions, or from other material using a computer or typewriter; inputs and retrieves data and text using a computer terminal.
- Designs business processes and work flow strategies for the maintenance, access and retrieval of data; defines data rules and relationships, and develops methods for quality control of the records management system.
- Advises and consults with users to develop required application services and business processes; assists in planning, coordinating and scheduling future needs keeping all parties informed of plans, progress, training requirements and budgetary issues; develops and recommends application and resource priorities.
- Evaluates existing program performance and recommends improvements to operational performance and security; administers changes and adjustments to systems as needed.
- Coordinates and maintains security user access controls. Develops and implements automated processes.
- Acts as point of contact for the day-to-day operations of the electronic records management system; troubleshoots system problems; isolates the cause of system failures.
- Responds to and resolves software users' inquiries and complaints and escalates problems or issues to vendor representatives or programmers as needed.
- Coordinates with the Information Technology Division to troubleshoot and resolve system problems and makes system modifications.

- Coordinates training for and trains users on the operation of the electronic records management system.
- Evaluates department business needs and individual user's job responsibilities to configure, build, and implement customized scanning sessions; creates codes and tokens, writes scripts that accurately capture data; detects poor image quality and performs automatic image enhancements.
- Creates workflows for departments or individual staff; works with department supervisors and support staff to evaluate their process for distributing documents; sets up starting rules and activities; tests and monitors the ongoing process and makes any adjustments or upgrades as needed.
- Customizes and maintains weblink; publishes documents; creates custom search forms and links to URLs; determines sets up and maintains security rights for city staff and public users; provides training and continued support to city staff and public.
- Performs other duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Principles and practices of records management including records retention laws.
- Manual and electronic records management systems.
- Methods and techniques of document indexing and coding.
- Applicable Federal, State, and local laws, codes, and regulations.
- Various software packages including word processing, spreadsheet, database and database management.
- Principles and practices of data collection and report preparation.
- Business letter writing and the standard format for reports and correspondence.
- Business arithmetic and statistical techniques.
- Alphabetical and numerical filing methods.
- Modern office practices, methods, and computer equipment.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for dealing effectively with the public, vendors, contractors, and City staff, in person and over the telephone.
- Techniques for providing a high level of customer service to public and City staff, in person and over the telephone.

### **Ability to:**

- Develop and maintain complex record keeping systems.
- Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
- Accurately evaluate and prioritize software requests.
- Research, develop and recommend cost-effective technical system improvements.
- Interpret, explain, and apply applicable Federal, State, and local laws, codes, regulations, policies, and procedures.
- Maintain security, confidentiality, and integrity of City records and information.
- Respond to requests and inquiries for information regarding records management.
- Train employees in the use of records and management program.
- Perform work with accuracy, speed, and general supervision.
- Understand the organization and operation of the City and of outside agencies as necessary to assume assigned responsibilities.
- Interpret and apply administrative and departmental policies and procedures.
- Respond to and effectively prioritize multiple phone calls and other requests for service.

- Compose correspondence and reports independently or from brief instructions.
- Understand and follow oral and written instructions.
- Make accurate arithmetic, financial, and statistical computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate and maintain modern office equipment, including computer equipment and specialized software applications programs.
- Exercise good judgment, flexibility, creativity, and sensitivity in response to changing situations and needs.
- Comprehend and use English effectively including producing all forms of communication in a clear, concise, and understandable manner to intended audiences.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and harmonious working relationships with those contacted in the course of work.

**EDUCATION AND EXPERIENCE:**

*Any combination of training and experience that would provide the required knowledge, skills and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to the completion of the twelfth (12<sup>th</sup>) grade supplemented by specialized training or college-level coursework in records management or a related field and four (4) years of records management experience with two (2) years experience providing administration and technical support to users of an electronic document management system.

**Licenses and Certifications:**

- Possession of a valid driver's license with a satisfactory driving record.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various City and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, typewriter keyboard, or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, reach, climb up and down ladders, 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 weighing up to 40 pounds. Occasionally, employees may have to push and pull materials and objects up to 120 pounds, with the use of proper equipment.

**ENVIRONMENTAL ELEMENTS**

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