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Bargaining Unit: GE
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PA # 9/SRDIX.1-2

County of El Dorado
August 1990

SENIOR RECORDABLE SR. RECORDER DOCUMENT EXAMINER / INDEXER

DEFINITION

~~Under general supervision, assigns, directs and reviews the work of a small staff of Recordable Document Indexers; provides difficult document indexing in support of the Recorder/Clerk's office; using an alphanumeric keyboard, enters data into a permanent document index; operates a departmental mainframe computer to process such documents.~~

DISTINGUISHING Under general direction, performs difficult and complex duties related to the processing, recording, and indexing of legal documents pertaining to real and personal property, and vital records; provides information to visitors to the Recorder's Office in person and by telephone; provides lead direction and training to assigned staff; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Recorder-Clerk Supervisor. Exercises technical and functional direction over and provides training to lower-level staff.

CLASS CHARACTERISTICS

~~This is the working lead level in the recordable documents indexer series, with responsibility for providing direction to staff performing similar work. This is not considered a supervisory class in that the selection and discipline of employees is not assigned to this level. This class is distinguished from Assistant County Recorder in that the latter is the first full supervisory level in this series, which also acts as assistant to the department head. This class is further distinguished from Senior Recordable Document Examiner in that the latter is the working lead level over staff that receive, examine, and classify varied documents at a public counter.~~

This is the advanced-level classification in the Recorder Document Examiner/Indexer series. Incumbents work under direction and exercise a high level of discretion and independent judgment in performing the full range of routine to complex duties, and provide ongoing technical direction to assigned staff. 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.

EXAMPLES OF DUTY/TYPICAL JOB FUNCTIONS (Illustrative Only)

- ➤ Provides lead direction, training, work review, and evaluation to ~~a~~ support staff ~~providing performing~~ document ~~review, examination, recording, and~~ indexing ~~and recording~~; organizes and assigns work; sets priorities and follows up to ensure coordination and completion of assigned work; instructs staff in work procedures.
- ~~Performs difficult or~~ Provides input into selection decisions and disciplinary matters.
- ~~Receives, examines, and classifies a wide variety of complex recordable document review, indexing and data entry, and~~ legal documents, including, but not limited to, land-related documents; marriage, birth, death, and other vital statistics; liens and releases, and abstracts of judgments.
- ➤ Ensures adherence to legal codes and recording requirements; and assists with special office projects as ~~required~~ assigned.
- ~~Operates the departmental mainframe computer to produce specified reports on a daily or periodic basis; modifies programs by adding codes, sorting parameters, etc.~~
- ➤ Examines ~~and analyzes various~~ legal documents for sufficiency, ~~completeness and/or adherence to legal codes and recording requirements~~ of information, jurisdiction, and appropriateness of recording; returns documents that may not be recorded, noting discrepancies and reasons for rejection, in person or by mail.
- ~~Operates an alphanumeric data entry keyboard using a complex macro program~~ Computes and accepts payments of fees; issues receipts; accounts for monies received on a daily basis by balancing against records of receipts.
- ➤ Operates specialized department computer system to enter information from ~~such~~ recorded documents into permanent indexes by major categories, such as dates, fees, taxes, document numbers, names, places ~~and, or~~ addresses; ~~processes documents from outside sources via an Electronic Recording System.~~
- ~~Key verifies~~ Provides customer service to the public, over the counter and by telephone, regarding document recording procedures and requirements; often serves as the second escalation to customer complaints and issues.
- Performs marriage ceremonies; and swears in and provides training for Deputy Commission of Marriages.
- ➤ Verifies files by comparing with original source documents; totals and checks balances on documents with control columns.
- Balances daily cash receipts and completes necessary deposit forms.
- ➤ Corrects errors in indexed information during verification; amends and updates ~~the~~ databases as required.
- ~~Reviews~~ Produces specified ~~portions of~~ reports on a daily or periodic basis from departmental mainframe computer applications.
- Performs routine clerical work as required, which may include but is not limited to preparing office equipment for daily use, preparing reports and correspondence, copying and filing documents ~~and forms submitted,~~ entering and retrieving computer data, processing mail, sending and receiving faxes, answering the telephone, and other related duties.
- Organizes and maintains various files; purges files as required; maintains tickler files and follows up as necessary.
- Submits required documentation to state, federal, and/or official government agencies; transmits records, as required, to the State Office of Vital Records; and registers and archives documents as required by ~~Recordable Document Examiners~~ law.
- ➤ Receives and reviews pertinent and required information of maps for accuracy, ~~completeness of information and compliance~~ and to verify accordance with ~~codes~~ applicable laws, guidelines, policies, and procedures.

- ~~• Attendance and punctuality that is observant of scheduled hours on a regular basis.~~
- Attends trainings, meetings, workshops, etc., as required to enhance job knowledge and skills.
- Performs related ~~work~~duties as assigned.

~~Senior Recordable Document Indexer~~
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QUALIFICATIONS

Knowledge of:

- ~~○ Basic supervisory principles and practices.~~
- Indexing Principles of providing functional direction and training.
- ⇒ Applicable federal, state, and local laws, codes, and procedures for a wide variety regulations governing the recording of recordable legal documents.
- ⇒ Legal codes, terminology, and legal recording, indexing, and classification procedures and requirements.
- Practices and procedures of document recording.
- County and department policies and procedures.
- Legal instruments that affect property ownership.
- Legal documents and vital statistics customarily presented for recording.
- Business letter writing and the standard format for typed materials.
- Business arithmetic.
- ~~data processing principles~~ Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.
- The structure and content of the English language, including the use of alphanumeric data entry meaning and spelling of words, rules of composition, and grammar.
- ⇒ Modern equipment and departmental specific computer operations. communication tools used for business functions and program, project, and task coordination.
- Office practices and procedures, including filing and the operation of standard office equipment. Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- ⇒ Plan, organize, ~~Business arithmetic.~~

Skill in:

- ⇒ Assigning, directing and reviewing coordinate the work of ~~others.~~ assigned staff.
- Training others Provide staff leadership and work direction.
- ⇒ Train staff in work procedures.
- Reviewing and interpreting Understand, interpret, and apply pertinent federal, state, and local laws, codes, regulations, policies and procedures.
- Analyze situations accurately and adopt an effective course of action.
- Explain and apply a variety of legal terminology, concepts, codes, and recording requirements related to office support work.
- Monitor varied documents for accuracy, correctness, and compliance with codes, policies, and regulations.
- Review and interpret recordable documents for indexing purposes.
- ⇒ Independently review and interpret recordable documents for indexing purposes.

- ~~○ Monitoring varied documents for accuracy, correctness~~Reviews maps, deeds, and compliance with codes, policies and regulations.
- ~~○ Operating an alphanumeric data entry keyboard~~other land records as pertains to enterrecordability of document information with speed and accuracy.
- ~~○ Operating a departmental mainframe computer and related peripheral equipment.~~
- ~~○ Prioritizing work and coordinating several activities.~~
- ~~○ Making~~Establish and maintain a variety of filing, recordkeeping, and tracking systems; review and record legal documents.
- ~~○ Make~~accurate arithmetic calculations.
- ~~○ Organizing and maintaining accurate files and records.~~
- ~~○ Establishing and maintaining~~Deal tactfully and effectively with a variety of individuals, some of whom may be hostile or irate and/or from varying ethnic and socioeconomic backgrounds.
- ~~○ Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.~~
- ~~○ Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.~~
- ~~○ Effectively use computer systems, software applications, 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.~~
- ~~○ Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.~~
- ~~○ Establish, maintain, and foster positive and~~effective working relationships with those contacted in the course of the~~work.~~
- ~~○ Typing accurately at a rate of 40 net words per minute from printed copy.~~

Other Requirements

~~Must be able to sit for extended periods of time in front of a video display terminal and maintain attention to detail.~~

Education and Experience:

~~One year~~Any combination of the required experience in, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.

Equivalent to graduation from high school and two (2) years of experience examining, indexing, and/or processing a variety of legal documents~~recordable documents~~ at a level equivalent to the ~~County's~~County's class of ~~Recordable~~Recorder Document ~~Examiner/~~Examiner/Indexer II.

Licenses and Certifications:

- ~~○ None.~~

PHYSICAL DEMANDS

~~Must~~**NOTE:** The above qualifications are a typically accepted way of obtaining the required knowledge and skills.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, before groups, and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. 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 occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve file information. Employees must possess the ability to lift, carry, push and pull materials, and objects up to 30 pounds. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work primarily 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.