



RECORDS TECHNICIAN

DEFINITION

Under general supervision, performs technical records and information-management duties including the receipt, indexing, scanning, storage, retrieval, and lawful destruction of County records; applies established retention schedules and legal requirements; provides courteous service to internal and external customers; and, on a limited basis, performs routine front-desk and administrative duties.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Clerk of the Board of Supervisors or assigned management staff. Exercises no supervision of staff.

CLASS CHARACTERISTICS

This journey-level technical classification is responsible for the full range of records-center functions. Incumbents work independently within established procedures to carry out assignments requiring knowledge of records laws, indexing systems, and digital-imaging standards. This class focuses on records management functions in addition to providing support to the Board office. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

- Receives, logs, and assigns bar-code or location numbers to boxed records transferred from County departments; transports boxes and updates the electronic records-management database.
- Reviews transfer lists for compliance with the County retention schedule; classifies records and recommends appropriate disposition codes.
- Scans or imports imaged records into the electronic content-management system (ECMS); performs quality control to verify page count, image clarity, and metadata accuracy.
- Retrieves and delivers requested files or boxes; tracks chain of custody and maintains confidentiality of protected information.
- Monitors scheduled destruction dates; prepares notices, obtains departmental approvals, and coordinates secure shredding.
- Provides technical guidance to departmental liaisons on records preparation, classification, retention, and ECMS search techniques.
- Maintains Records Center inventory; rearranges shelving for efficient space utilization; prepares workload, storage-capacity, and activity reports.
- Operates pallet jacks, rolling ladders, and County vehicles in the safe movement of record boxes.
- Covers the Clerk of the Board or departmental front counter during breaks or short absences; answers multi-line phones, greets visitors, processes routine filings (including Claims against the County), assists with processing the paperwork following a Board meeting, and provides forms or information.
- Assists with assembling and distributing Board agendas and meeting packets; sets up conference rooms and audio/visual equipment; posts documents to the County website.
- Processes, edits, and uploads Board and Committee/Commission meeting recordings, integrating closed captioning for accessibility and compliance.

- Composes, proofreads, and edits correspondence, reports, and standard forms; maintains calendars, schedules courier pickups, and orders office supplies.
- Observes safe work practices and follows County policies and procedures.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of records and information management, including filing, indexing, imaging, retention, and destruction.
- Federal, state, and local laws and regulations governing public records, confidentiality, and retention (e.g., the California Public Records Act and Government Code 26202).
- Office administrative procedures, business correspondence, proofreading, and recordkeeping.
- Basic functions of an elected Board or similar governing body and related meeting processes.
- Customer-service techniques and the structure and content of the English language.
- Modern office equipment and software, including ECMS, document-imaging hardware, and Microsoft Office suite.
- Basic arithmetic and methods for compiling statistical reports.
- Safe work practices related to the lifting and movement of boxed records and the operation of material-handling equipment.

Ability to:

- Perform specialized records-management duties in conformance with legal and policy requirements.
- Accurately scan, index, and retrieve electronic records and verify image quality.
- Interpret, apply, and explain records-retention schedules and public-records laws.
- Safely lift and move boxes weighing up to 40 pounds and operate forklifts, pallet jacks, and County vehicles.
- Maintain confidentiality and security of sensitive information.
- Organize own work, set priorities, and meet critical deadlines with minimal oversight.
- Provide courteous and effective customer service; communicate clearly and concisely, both orally and in writing.
- Prepare clear and accurate correspondence, forms, and reports.
- Use computer systems, software applications, and modern office equipment effectively.
- Establish and maintain positive working relationships with those contacted in the course of work.

Education and Experience:

A combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying; however, education may not solely substitute for the required experience.

Equivalent to graduation from high school, and two (2) years of increasingly responsible clerical, storekeeping, or administrative support experience that included records management, document imaging, or file maintenance responsibilities. Experience in a governmental records center or using an electronic content-management system is desirable.

Licenses and Certifications:

- Possession of, or ability to obtain and maintain, a valid California or Nevada Driver's License and a satisfactory driving record.

PHYSICAL DEMANDS

Must possess mobility to work in a Records Center warehouse and standard office environment; strength to lift, carry, push, and pull record boxes weighing up to 40 pounds and to operate material-handling equipment; vision to read printed material and a computer screen; and hearing and speech to communicate in person and by telephone. Frequent standing and walking between work areas is required; finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator. Employees occasionally bend, stoop, kneel, reach, and climb ladders or step stools.

ENVIRONMENTAL CONDITIONS

Employees work in both warehouse and office environments with moderate to loud noise levels, exposure to dust and fluctuating temperatures, and occasional exposure to moving mechanical parts. Employees may interact with upset staff, vendors, and members of the public while interpreting and applying departmental policies and procedures.

WORKING CONDITIONS

May be required to work evenings or irregular hours to prepare for Board meetings, large-scale imaging projects, or records moves; may wear personal protective equipment such as gloves and back-support belts.