



CLASSIFICATION NO. 139

Established: 7/78

Revised: 3/94, 7/96, 10/04, 5/09, 12/18, 3/26

FLSA: Non-Exempt

EEO: 6

## **RECORDS AND ARCHIVAL SPECIALIST**

### **CLASS CHARACTERISTICS**

Under general supervision, to digitize, film, archive, store, and transport County records; to provide internal customer service records management support; to provide external customer service passport application acceptance processing support; and to do other work as required.

### **DISTINGUISHING CHARACTERISTICS**

The Office of the County Clerk is responsible for administering and conducting all federal, state, and local elections in Clackamas County; processing all real property transactions, plats, Board of County Commissioner's Journal documents, and Board Orders for Clackamas County; issuing marriage licenses and officiating weddings; processing Oregon Liquor Cannabis Commission (OLCC) applications; coordinating the Board of Property Tax Appeals which resolves property assessment appeals; accepting passport applications; and supporting other County departments with storage and preservation of the County's archival records and with public records requests.

The Records and Archival Specialist is the first level in the Records and Archival classification series within the Records Management Division. Incumbents perform specialized and technical duties in document conversion of various printed and digital records according to established laws, procedures and standards of the Oregon State Archives, provide County departments with preservation and access to County records, and perform these duties in a high-volume production work environment. The Records Management Division is also a designated passport acceptance facility and as such the Records and Archival Specialists provide passport acceptance processing and photo services to the public.

Records and Archival Specialist differs from Records and Archival Specialist, Senior which serves as lead worker to assigned staff, coordinates and oversees work assignments and training, and performs a variety of records management activities to assist the Records and Archives Manager. It differs from the Office Specialist classification series, which performs a variety of moderately difficult administrative support activities according to generally established guidelines, regulations or instructions.

### **TYPICAL TASKS**

Duties may include but are not limited to the following:

1. Prepares a wide variety of paper and digital documents for scanning or digitizing to either or both archival film and electronic document management system; completes correct set-up of document conversion machines, prepping and indexing pre-requirements and specifications for each department or project; examines documents for poor reproduction and viewing properties; identifies discrepancies and makes appropriate corrections to images; notifies lead worker as appropriate; sets-up scanners, film processor, archive writer, and prepares targets and certifications.

2. Scans documents to microfilm or digital format, converts digital documents to microfilm, and creates digital data from microfilm in a high volume production work environment; exports and imports digital documents from county departments; ensures digital images are rotated correctly for transfer to either microfilm or electronic document management system; prepares and inserts certifications and targets with images to be transferred to microfilm; resolves document scanner problems; creates inventory; indexes individual images; tracks and reports statistical information on each document capture project.
3. Inspects archival film and digital images to ensure quality control standards and client specifications; prepares inspection sheets and documents any flaws that were detected in the images; measures density and resolution to ensure they are within the parameters of laws, rules and standards set forth by the State of Oregon; regularly inspects and makes adjustments to inspection equipment to ensure kept in working order; performs recalibrations, cleaning of lenses and checks that machine's equipment is working; notifies lead worker of any issues or concerns.
4. Performs records storage and inventory control for digital data storage and at records warehouse; processes large volumes of incoming and outgoing records using a web-based data system scanned with smart phone; reviews, sorts, classifies, and integrates documents; responds to client records requests including transfers, refiles, interfiles and disposal; performs routine and specialized records searches; assists in the transfer and disposal of records based on established retention schedules; operates a motorized pallet jack and hand-held pallet lift; drives a County vehicle to distribute and pick-up sensitive and/or confidential records from various County locations within an established time schedule.
5. Processes large amount of detailed records requests for District Attorney's Office regarding expunged records; researches and retrieves records from archival film; converts images to digital and transfers documents via secure file sharing platform.
6. Provides customer service to assist the public and County staff with inquiries; provides accurate and timely information; refers Public Records Requests to appropriate County department; provides information to ensure compliance and understanding of records and information storage rules, regulations and functions; assists County departments with inquiries regarding records and document management programs; answers basic questions from County departments regarding their usage of the County's electronic records storage system such as pick-up and delivery schedules and entering orders; answers questions regarding records retention.
7. Provides customer service to assist public with passport application acceptance process and swearing in process to affirm identify; receives, reviews, and processes passport applications; calculates and collects fees; explains complex passport policies and procedures; issues receipts and balances cash received; prepares bank deposits; checks for and reports suspected fraud; submits processed passport application in compliance with established rules; prepares and mails passport transmittal receipts identifying regular and expedited requests.

## **REQUIRED KNOWLEDGE AND SKILLS**

Working knowledge of: Document preparation, scanning and quality control processes, including data export/import, and electronic document management systems; digital to microfilm processes; micrographic and digital imaging standards, practices, rules, and regulations; archival film production; records management principles; State and County records retention schedules; inventory methods and techniques; office practices and procedures, including alphabetical, numeric, terminal digit and chronological filing systems and their uses; laws, rules

and regulations applicable to imaging and microfilming, records storage functions, and passport processing; personal computers and software applications, including spreadsheets and database programs, scanner equipment, cleaning and maintenance.

**Skill to:** Independently, accurately, and effectively perform assigned work following established procedures and policies; communicate effectively, both orally and in writing; read, interpret and explain laws, rules, policies and procedures; establish and maintain effective working relationships with the public, co-workers and other County department staff; provide customer service by effectively meeting and interacting with the public, co-workers and personnel of other departments in a courteous, professional manner; skillfully operate office and computer equipment, including scanners, micrographic equipment and software applications; evaluate quality of documents; correct equipment malfunctions causing poor quality documents; arrange and search records alphabetically, numerically and chronologically to include terminal digits; operate light motorized equipment, such as fork lift and pallet lift.

### **WORKING CONDITIONS**

Duties require frequent standing, walking, squatting, kneeling, bending, twisting, reaching, fine motor control, climbing stairs, and the ability to lift and carry up to 40 pounds, and push and pull 35 pounds. Duties also involve occasional exposure to slippery and/or uneven surfaces and dust.

### **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the minimum experience, education, licensure, and/or certifications required for employment in the classification. The following minimum qualifications are established for this classification. Additional minimum qualifications and special conditions may apply to a specific position within this classification and will be stated on the job announcement.

**Experience:** A minimum of two (2) years of related experience, which must include one (1) year working with document scanning and one (1) year of customer service experience, that would provide the required knowledge and skills to perform the responsibilities of this position.

**Licenses/Certifications:** None required.

### **PRE-EMPLOYMENT REQUIREMENTS**

Must successfully pass a criminal history check which includes national or state fingerprint records check.

Employment is contingent upon passing a post-offer physical assessment. Accommodation requests will be reviewed on an individual basis in compliance with State and Federal legislation.

Driving is required for County business to accomplish work. Incumbents must possess a valid driver's license, possess and maintain an acceptable driving record throughout the course of employment..

## **POST-EMPLOYMENT REQUIREMENTS**

Within 30 days of hire, must meet all U.S. Department of State basic eligibility requirements (22 C.F.R. § 51.22(c) and (d)) including: passing U.S. Department of State background check and Agent Acceptance exams, be a U.S. citizen or U.S. non-citizen national, have no federal or state felony convictions, nor misdemeanor convictions for crimes involving moral turpitude or breach of trust.

Within 6 months of hire, must pass and maintain annual certification with both the Department of Justice and Clackamas County Public Health related to the confidential and secure handling and storage of paper records.