



CLASSIFICATION NO. 139  
Established: 7/78  
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FLSA: Non-Exempt  
EEO: 6

## **RECORDS AND ARCHIVAL SPECIALIST**

### **CLASS CHARACTERISTICS**

Under general supervision, to digitize, microfilm, 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 Records Management Division within the County Clerk's Office acts as a secure off-site records repository of historic, permanent and other records for the County. These internal services include document capture services of scanning and microfilming, digital records access via county's electronic document management system, records storage of paper records, oversight of confidential records shredding services, and records management services of retention scheduling, records management training, and development of county-wide records policies and procedures. The Records Management Division provides external services as a designated passport acceptance facility providing passport application processing and photo services to the public.

The Records and Archival Specialist catalogs, microfilms, images, scans, stores and retains records and data for easy accessibility in digital format or hard copies. Incumbents perform specialized, technical duties in preparing and processing various printed and digital materials according to established laws, procedures and standards. This is a high volume production work environment where staff track and bill time for each project and department. The Records and Archival Specialists also provide a variety of customer service support to County departments, local governments, and the public, including records storage, retrieval, delivery and re-file services and passport acceptance processing.

The Records and Archival Specialist differs from the 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 Information Manager. It differs from the Office Specialist classification series which perform 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 documents for scanning to either or both microfilm and electronic document management system; completes correct set-up, prepping and indexing per the requirements and specifications for each department or project; examines documents for poor reproduction and viewing properties; identifies discrepancies and notifies lead worker as appropriate; sets-up scanners 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.
3. Inspects microfilm and digital images to ensure quality control standards and client specifications; prepares inspection sheets to document that quality review was performed, and corrective actions were taken if flaws were detected; measures density and resolution of microfilm following established laws, rules and standards; ensures that equipment is properly maintained and in good working condition; performs daily maintenance and minor repairs.
4. Tracks and reports statistical information on each document capture project; identifies and uses correct codes.
5. Creates inventory, catalogues and retains records and data for stored documents; indexes individual images for ease of accessibility by county users; performs data entry, data retrieval and data deletion into document management system using web-based and network-based systems
6. 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; reviews, sorts, classifies, and integrates documents; responds to client records requests including transfers, re-files, interfiles and disposal; performs routine and specialized records searches; assists in the transfer and disposal of records based on established retention schedules; operates a 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.
7. Assists 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 questions regarding records retention.
8. Assists 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**

Thorough 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.

Working knowledge of: Records management principles; 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; operate light motorized equipment, such as a 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 that would provide the required knowledge and skills to perform the responsibilities of this position.

**Licenses/Certifications:** None Required.

### **PRE-EMPLOYMENT REQUIREMENTS**

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 on a regular basis or to accomplish work. Incumbents must possess a valid driver's license, possess and maintain an acceptable driving record throughout the course of employment, and be in compliance with the County's Risk Management Policy regarding driving a county vehicle.

### **POST-EMPLOYMENT REQUIREMENTS**

Within 30 days of hire, must be certified as a U.S. Department of State Passport Acceptance Agent which requires U.S. citizenship and other qualifications set forth by the U.S. Department of State Passport Application Acceptance Program, and passing U.S. Department of State background check and Agent Acceptance Test.

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.