



CLASSIFICATION NO.140
Established: 10/04
Revised: 1/09, 12/18
FLSA: Non-Exempt
EEO: 6

RECORDS AND ARCHIVAL SPECIALIST, SENIOR

CLASS CHARACTERISTICS

Under general supervision, to act as lead worker of assigned staff; to coordinate and perform records and information management processes and passport application acceptance processing; to assist with maintaining and updating department-level record retention schedules and county-wide records management practices and procedures; 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, Senior performs lead work and project coordination responsibilities related to document conversion and quality control, county-wide records storage operations and electronic document management system, and records management activities. The Records and Archival Specialist Senior creates, assigns, monitors progress, and completes closing process for all County department work orders, and submits staff project/time information to Records and Information Manager for billing. The incumbent assists the Manager by also performing a variety of advanced records management assignments.

The Records and Archival Specialist, Senior differs from the Records and Archival Specialist which performs document capture, records storage and passport acceptance activities. It differs from the Records and Information Manager which manages the programs and activities of the Records Management Division, supervises staff, and serves as the County's Records Officer.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Leads the work of assigned regular and temporary employees; identifies and provides training in records management procedures, electronic document management, document reproduction and quality control; coordinates, assigns and reviews work; assists in development and preparation of procedures and work processes; provides feedback to manager regarding work performance.

2. Coordinates variety of document scanning, conversion and storage projects; analyzes client requirements; prepares work orders and instructions; tracks progress of projects; performs quality control of finished film and digital products; verifies time and work codes for each project; oversees and performs microfilm inspection and documentation; measures density and resolution of serialized (roll) microfilm following established laws, rules, and standards; oversees and performs preparation of microfilm jacketing process ensuring client requirements are met.
3. Monitors and updates variety of statistical and inventory data and specialized records management software; contacts and interacts with software provider for technical support; runs statistical and diagnostic reports; troubleshoots software issues.
4. Assists in administration of records management database; operates and trouble-shoots electronic records systems including web-based records management application and network-based systems and computer hardware and software applications related to digital imaging; ensures equipment, including document scanning equipment, is properly maintained and in good working order; performs daily maintenance and minor repairs; monitors supply inventories and notifies manager of restocking needs.
5. Recommends updates to records center retention processes, procedures and policies; updates training materials; assists with monitoring state and federal rules and regulations pertaining to records management program; assists manager in developing county-wide records management practices, procedures and policies; consults with state archives staff and other legal resources for clarification or interpretation of rules and statutes.
6. Assists county departments with their records requests and electronic document management needs; explains processes and provides trainings; verifies and updates retention schedules; categorizes and classifies records series to make corrections to record retention schedules; reviews in-coming records to determine classification and integration into document management system; audits records for proper destruction.
7. Provides customer service to the public and county department staff via telephone calls, e-mails and at counter; assists staff with complex or difficult public inquiries and refers customers to appropriate staff/resources; provides information to ensure compliance and understanding of agency rules, regulations and functions.
8. Performs and oversees the passport application process and ensures compliance with rules set forth by the U.S. Department of State Passport Application Acceptance Program; assists staff with complex or difficult passport application issues; receives, reviews and processes passport applications; assists public at the counter with passport application acceptance process and swearing in process to affirm identity; checks for and reports suspected fraud; calculates and collects fees; issues receipts and balances cash received; prepares bank deposits; prepares and mails passport transmittal receipts identifying regular and expedited requests; maintains and organizes passport documentation and forms.
9. Performs records storage and inventory control for digital data storage and at records warehouse; drives a County vehicle to distribute and pick up sensitive and/or confidential records from various County locations within an established time schedule.

REQUIRED KNOWLEDGE AND SKILLS

Thorough knowledge of: Document preparation, scanning and quality control processes, including data export/import, electronic document management systems; digital to microfilm processes; microfilm and digital imaging standards, practices, rules, and regulations.

Working knowledge of: Techniques of supervision and training; concepts and techniques for prioritizing, organizing work; records management principles; County records retention schedules; office practices and procedures, including alphabetical, numeric, terminal digit and chronological filing systems; inventory methods and techniques; laws, rules and regulations applicable to imaging and microfilming, records storage functions, records retention, and passport processing; preservation, processing, reproduction and maintenance of public records, and paper, microfilm and electronic records; personal computers and software applications, including database programs, scanner cleaning and maintenance.

Skill to: Independently, accurately and effectively perform assigned tasks and duties following established procedures and policies; communicate effectively, both orally and in writing; read, interpret and explain laws, rules, policies and procedures; coordinate, train, and lead the work of staff; 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; operate micrographic and computerized digital imaging equipment, including scanners; evaluate quality of documents; correct equipment malfunctions causing poor quality documents; arrange and search records alphabetically, numerically and chronologically using several database fields; understand and follow written and oral instructions; 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 three (3) years of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

Licenses/Certifications:

The following licensure/certifications are required at the time of hire.

- 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.

- Must possess 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.

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.