



CLASSIFICATION NO.140
Established: 10/04
Revised: 1/09, 12/18, 3/26
FLSA: Non-Exempt
EEO: 6

RECORDS AND ARCHIVAL SPECIALIST, SENIOR

CLASS CHARACTERISTICS

Under direction, to lead the work of assigned staff; to coordinate and perform records and information management processes and passport application acceptance processing; to assist with maintaining, updating and training regarding County's department-level record retention schedule and usage of the County's electronic record inventory system by County staff, and county-wide records management practices and procedures; 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, Senior is the advanced working level within the Records and Archival Specialist classification series. The Incumbent has lead work responsibility for assigned staff and guides day-to-day activities. Incumbent also has 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 and outside agency work orders, and submits project statistics to Records and Archival Manager for billing. The incumbent also assists the Records and Archival Manager with advanced records management projects and the training of staff in other County departments.

The Records and Archival Specialist, Senior differs from the Records and Archival Specialist as the Senior leads Specialists in the performance of document conversion, records storage and passport acceptance activities. It differs from the Records and Archival Manager which manages the program 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 staff; coordinates, assigns, monitors and reviews work; identifies and provides training on records management processes and procedures, electronic document management, document conversion software and machines,

reproduction, raw film processing and developing using sophisticated software, darkroom development of archival film, and quality control; assists Records and Archives Manager in developing procedures and work processes; provides feedback to manager regarding work performance.

2. Prepares, distributes and monitors work orders assigned to Records and Archival Specialists; analyzes client requirements from County and outside Agency specifications; stages records for in-house work orders; tracks progress of projects; performs inspections on archival film to ensure all density and resolutions are following established laws; completes closing process on work orders.; ensures 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 advanced electronic records systems including both web-based applications and network-based systems, and computer hardware and software applications related to digital imaging and document conversion.
5. Regularly checks and ensures all electronic imaging, archive writer, and processing machines are in good working order; performs routine maintenance and notifies Manager and County's Technology Services Department of any issues; runs statistical and diagnostic reports; monitors supply inventories and notifies manager of restocking needs.
6. Recommends updates to Manager for maintaining county retention schedule and 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.
7. Assists county departments with their records requests and electronic document management needs; perform accessioning of new records; records essential identifying information regarding records creation; 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; creates records destructions per Oregon retention rules and laws; forwards destruction requests to county departments for approval; authorizes and processes destructions and follows process through final disposition of records process.
8. Provides customer service to the public and county department staff via telephone, emails 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.
9. Provides customer service and perform and oversee the passport application process and ensure 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.

10. Performs records storage and inventory control for digital data storage and at records warehouse; inspects and repacks and repairs boxes where records are stored; refiles records back into records center; operates 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.

REQUIRED KNOWLEDGE AND SKILLS

Thorough knowledge of: Document preparation, scanning and quality control processes, including data export/import, electronic document management systems; State and County retention schedule and requirements; digital to microfilm processes; microfilm and digital imaging standards, practices, rules, and regulations; archival film production.

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 application 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, assign, train, and lead the work of staff; monitor progress of work orders and inspect for compliance with State Archives laws; establish and maintain effective working relationships with the public, co-workers and other County department staff; assist in training of county department-level staff regarding usage of County's electronic record inventory system; 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; perform maintenance and 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 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 three (3) years of related experience, which must include one (1) year of lead worker, team leader, project leader, or supervisory 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, and 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 30 days 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.