

## Records Specialist

FLSA Status: Covered  
Bargaining Unit: District Council of Trade Unions (DCTU)

### General Summary

Under general supervision, positions in this class perform specialized clerical work in records management for a large bureau or section involving organizing, indexing, filing, scanning, storing, archiving, and retrieving a large volume of documents.

### Records Specialist - 30000828

#### Distinguishing Characteristics

Positions in this class provide records management services to a large bureau or section. Work involves organizing and maintaining a central file system, managing hard copy filing, and updating and maintaining a records database. Incumbents are expected to complete work independently with limited assistance and supervision. This class differs from the Office Support Specialist series by the focus on complex records management.

#### Typical Duties/Examples of Work

1. Organizes and maintains a central file system; files, tracks, and retrieves documents; archives and purges old documents in accordance with Bureau, City, State, and Federal records retention schedules.
2. Processes project records including scanning, uploading, indexing, data entry; manipulation, distribution and/or filing of documents into various records management systems.
3. Operates, maintains and troubleshoots electronic records systems including an internet-based document collaboration system and network based systems.
4. Monitors database records for inaccuracies and takes appropriate corrective action.
5. Assists with the development of records retention schedules for paper and electronic documents.
6. Develops and conducts bureau and individual trainings on records management and retention policies and procedures.

7. Reviews record management processes and recommends additions and changes to policies and procedures.
8. Responds to requests for document searches from City staff, other agencies, and the public; completes money transactions with the public for copy services including writing receipts and making change.
9. Organizes and maintains a technical resource library.
10. Performs related duties as assigned.

**Required Knowledge, Skills and Abilities**

Knowledge of: records management principles and processes; electronic file systems and internet based records systems; digital and still photo systems; Bureau, City, State and Federal records retention schedules; numerical and alphabetical filing systems and their uses; records request response policies and procedures; electronic and hard copy records search techniques, methods, and procedures.

Ability to: lift, carry and handle files and boxes that weigh up to 45 pounds; move oversized and bulky items including maps and plans; keep privileged information confidential; establish and maintain effective interpersonal relationships with a diversity of others; develop and conduct training on processes; communicate effectively, orally and in writing; provide effective customer service; effectively problem solve; interact positively with customers; work independently.

Skill in: filing; data entry and word processing software; spreadsheet packages and database tracking tools; accurate record keeping

**Classification History:**

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Adopted: 05-02-07

Revised: 03-20-15

June 2009 - Change Job Class number from 0112 to 30000828, due to system change.