

| Summary   |                                      |   |   |
|---|--------------------------------------|---|---|
| JOB DESCRIPTION NO:<br><b>321198</b>            | VERSION:<br><b>2</b>                 | PREVIOUS JD NO:<br><b>321198</b>              | POSITION CONTROL NO:                      |
| DEPARTMENT:<br><b>POLICY AND RECORDS ADMIN</b>  | UNIT CODE:<br><b>000102</b>          |   | VC AREA:<br><b>RSRC MGMT &amp; PLN</b>    |
| INCUMBENT NAME:<br><b>Master Card</b>           | PHONE:<br><b>00000</b>               | INCUMBENT EMAIL:                              | WORK LOCATION:<br><b>Main Campus</b>      |
| PAYROLL TITLE:<br><b>RECORDS ANL 2</b>          | TITLE CODE:<br><b>4713</b>           | SALARY GRADE:<br><b>CT 20</b>                 | HEERA:<br><b>All Others, Confidential</b> |
| BACKGROUND CHECK REQD?<br><b>Yes</b>            | C.O.I. DISCLOSURE REQD?<br><b>No</b> |   | PHYSICAL REQD?<br><b>No</b>               |
| SUPERVISOR NAME:<br><b>Paula Jeanne Johnson</b> | PHONE:<br><b>858-534-2552</b>        | SUPERVISOR EMAIL:<br><b>pjohnson@ucsd.edu</b> | SUPERVISOR TITLE:<br><b>DIR</b>           |

### Overview

#### WORKING TITLE

## Records Analyst 2 (100%)

#### DEPARTMENT OVERVIEW

Policy & Records Administration (P&RA) provides management and advisory services to the campus for public access and privacy compliance and administrative services for records and information management and chancellor's correspondence communications. P&RA's vision is to be the leader in public records and document management practices and technology in support of the University's mission of teaching, research, patient care, and public service. Routinely the University is faced with new unfunded mandates required by State law, Federal law and Regents policy. P&RA is one of the first areas that must respond to the changing environment without additional funds and or supplements. Our staff is highly cross trained and able to provide multi-tasks in this ever changing environment.

#### POSITION OVERVIEW

Uses knowledge of records management and University policies and internal procedures to take care of records management issues. Resolves a wide range of issues in consultation with supervisor, works on records management issues of moderate scope where analysis requires evaluation of identifiable factors. Exercises judgment within defined procedures and practices to determine appropriate action.

Under the general supervision of the Director, Policy & Records Administration, serve as a principal liaison for Chancellor's Correspondence Communications. Review, analyze and assign action for critical correspondence activities. Responsible for analysis, synthesis and approval of time sensitive Chancellor's Signature Items in strict compliance with University policies and guidelines. Analyze highly confidential matters, maintaining strict confidentiality.

Act as a team leader for the Chancellor's Correspondence and Records function. Assist in the development and implementation of electronic document management systems designed to manage and process records for the unit's functions. Perform analysis on a wide range of policy related actions as required and advise the Director-Policy & Records Administration on substantive issues. Assign workload effort and provide direct training to student-staff.

Serve as coordinator in the review and distribution of official campus notices. Develop and generate official record of campus notices.

Provide training and reporting coordination for complex software solutions to clients. Act as a campus expert in imaging technologies, electronic document management systems, case management systems and analyzing customer needs and designing solutions to fit their needs. Act as a Training Lead for software under the purview of Policy and Records Administration.

Independently investigate, evaluate, conduct feasibility studies, and make recommendations on a variety of subjects involving records and information management, privacy and compliance programs.

Serve as the executive secretary to the Campus Records Management Program Oversight Steering Committee (CRMPOSC). Apply an understanding of records management theory to assist the committee members in analyzing, interpreting, developing, and planning program initiatives.

#### EDUCATION AND EXPERIENCE

Bachelor's degree or equivalent combination of education and work experience; business, public administration or related field preferred.

#### SPECIAL CONDITIONS

DOJ and FBI background checks and clearances required prior to hire.

This position is confidential under HEERA

Requires flexibility in work schedule and possible overtime, to meet demanding and changing workload, in order to complete urgent and complex correspondence reviews in a timely manner.

#### LICENSES AND CERTIFICATIONS

#### EMPLOYEES DIRECTLY SUPERVISED

#### EMPLOYEES SUPERVISED THROUGH OTHERS

### Areas of Responsibility

| AREA OF RESPONSIBILITY   |                       | TOTAL PERCENT           |            |
|--|-----------------------|-------------------------|------------|
| <b>I. Chancellors Correspondence Communications</b>  |                       |                         | <b>35%</b> |
| Assists managers and staff in the proper creation, maintenance and use, storage, location, retrieval and disposition of records. Create and coordinate procedures for handling materials in electronic format, and conversion and migration of materials from one media to another. Implement new procedures as required and ensure the team is provided adequate training and coaching. Under the oversight of the Director, independently coordinate with campus departments, system-wide offices, and the Chancellor's office for all agenda submissions from the campus. Provide training and advice to campus departments in the preparation of materials and verify appropriateness of item utilizing UC policies and guidelines. Serve as the main point of contact with campus departments to provide training for campus users in the Clearance Sheet Item procedures. Analyze and create new procedures as requirements evolve. Recommend training methods and implement training plans as required. | Percent<br><b>10%</b> | Essential<br><b>Yes</b> |            |
| Performs special projects, such as reviewing alternative storage, developing new or revised procedures, or conducting quality monitoring and running reports as needed. As part of his/her regular responsibilities, participates in gathering data important to the formulation of management positions in collective bargaining.   | Percent<br><b>4%</b>  | Essential<br><b>Yes</b> |            |
| Prohibits unauthorized access to records containing personal or confidential information. As part of his/her regular responsibilities, sees documents which are used by management in developing management positions in collective bargaining or grievance matters. As part of his/her regular responsibilities, sees confidential documents concerning labor relations matters such as salary and fringe benefit costing for bargaining purposes.  | Percent<br><b>4%</b>  | Essential<br><b>Yes</b> |            |
| In accordance with established records management policy, supports the management of hard copy and electronic records within specific areas of authorized access. Policy & Records Administration functions as a confidential primary resource to the Chancellor's   | Percent<br><b>4%</b>  | Essential<br><b>Yes</b> |            |

|   |                       |                             |
|---|-----------------------|-----------------------------|
| Office in the management of executive correspondence and dissemination of information, facilitating collaboration with the Chancellor, Vice Chancellors, and Office of the President.   |                       |                             |
| Reviews, analyzes, classifies and indexes records, or consults others in these areas in accordance with established records management procedures. Serve as a principal liaison for Chancellor's Correspondence Communications. Responsible for analysis, synthesis and approval of time sensitive Chancellor's Signature Items in strict compliance with University policies and guidelines. Edit submissions for signature. Advise submitting departments on appropriate form and function of items. Responsible for ensuring the accurate translation of Chancellor correspondence. Coordinates the review of documents received and appropriate translations. | Percent<br><b>3%</b>  | Essential<br><b>Yes</b>     |
| Identifies inactive records that are ready for disposition according to the records retention schedule and procedures, and approves disposition according to procedure (in consultation with manager).  | Percent<br><b>3%</b>  | Essential<br><b>Yes</b>     |
| Responsible for all aspects of the signature pen system, including contracting with outside entities, for Director approval, to produce electronic signature files, maintaining the security and release of signatures, and working with departments to schedule volume signature projects. This requires an understanding of various types of electronic files, the ability to deploy new signatures as required, as well as maintaining peak operational performance of the software and hardware.  | Percent<br><b>3%</b>  | Essential<br><b>Yes</b>     |
| The incumbent will coordinate and ensure the Regents' Meetings responsibilities are performed. Coordinate and organize all aspects and arrange special accommodations required for onsite campus Regent's meetings or teleconferences. Communicate upcoming deadlines dates; maintain listings of future planned Regents' items, follow up and track development and progress of future items and inform Director and Vice Chancellors of status.   | Percent<br><b>2%</b>  | Essential<br><b>Yes</b>     |
| Use discretion and an understanding of issues to make decisions and resolve problems to promote efficiency and customer relations with departments submitting requests for signature.   | Percent<br><b>2%</b>  | Essential<br><b>Yes</b>     |
| AREA OF RESPONSIBILITY<br><b>II. Chancellors Record</b>   |                       | TOTAL PERCENT<br><b>25%</b> |
| Keeps current with internal and external regulations concerning records management policies and procedures. Ensure the confidentiality, access and privacy of information in the record is maintained according to applicable laws and policies. Act as records management coordinator, assigning retention and access period to the online system (Papyrus). Establish procedures to appropriately classify and file records, create files and structures and provide oversight of staff that process information in the record.   | Percent<br><b>10%</b> | Essential<br><b>Yes</b>     |
| Assists with recommending and implementing new and / or updated records management procedures. Participate in the design, implementation, and enhancements of customized database and web-based data collection/management systems to record and manage the chancellor's record, in accordance with laws, regulations and policies.   | Percent<br><b>5%</b>  | Essential<br><b>Yes</b>     |
| Compose and/or edit a broad range of correspondence and reports from a variety of text and data sources. Extract, analyze and produce productivity reports on operations. Maintain the File Plan, physical records index and all related databases and reports.   | Percent<br><b>5%</b>  | Essential<br><b>Yes</b>     |
| Facilitates the transfer of records from central files to inactive storage as appropriate. Analyze and process materials submitted for inclusion in the records, and transfer materials to archives as appropriate.   | Percent<br><b>5%</b>  | Essential<br><b>Yes</b>     |
| AREA OF RESPONSIBILITY<br><b>III. Campus Notices</b>  |                       | TOTAL PERCENT<br><b>11%</b> |
| Maintain the campus notices record and ensure accessibility to the campus community and public.   | Percent<br><b>4%</b>  | Essential<br><b>Yes</b>     |
| Analyze and review Campus Notices for clarity and consistency with existing policy. Serve as final editor before publication. Provide consultation to Vice Chancellor offices on official formatting of campus Notices.   | Percent<br><b>2%</b>  | Essential<br><b>Yes</b>     |
| Coordinate the operations for the campus notice process. Ensure the appropriate procedures are followed to meet the policy requirements. Serve as coordinator on behalf of the Chancellor's office in the review and distribution of official campus notices  | Percent<br><b>2%</b>  | Essential<br><b>Yes</b>     |
| Serve on campus committees related to communications and assist in the development of upgraded electronic delivery systems.   | Percent<br><b>1%</b>  | Essential<br><b>Yes</b>     |
| Maintain and coordinate mailing lists for both notices and flyers including subsets of 65,000 campus mailing identities. Update and establish list-serves as appropriate to address/reach specific campus populations   | Percent<br><b>1%</b>  | Essential<br><b>Yes</b>     |
| Attend committee meetings and fully participate in discussions related to research and analysis.  | Percent<br><b>1%</b>  | Essential<br><b>Yes</b>     |
| AREA OF RESPONSIBILITY  |                       | TOTAL PERCENT               |

| IV. Campus Records Management Program     |  |               | 14%              |
|---|--|---------------|------------------|
|   | Responsible for composition of meeting agendas and for final prioritization of all committee business items. Based on proposal analyses, determine whether business items are placed on agendas, deferred, or, if incomplete, what additional information is necessary. Track action items for follow up as necessary.   | Percent<br>4% | Essential<br>Yes |
|   | Prepare and submit reports to the Director and IPA Coordinators in support of the program.   | Percent<br>4% | Essential<br>Yes |
|   | Ensures proper records destruction processes are completed. Research proposals for retention period scheduling and conduct analysis of the requirements, based on policy, regulations, laws, etc.  | Percent<br>2% | Essential<br>Yes |
|   | Schedule and develop agendas and define topics for committee review in consultation with the Chair. Ensure timely production of committee minutes  | Percent<br>2% | Essential<br>Yes |
|   | Serve as the executive secretary to the Campus Records Management Program Oversight Steering Committee (CRMPOSC). Conduct, coordinate, and provide analysis the work of the standing committee to ensure the integrity of the campus records management program.   | Percent<br>1% | Essential<br>Yes |
|   | Attend committee meetings and fully participate in discussions related to research and analysis.   | Percent<br>1% | Essential<br>Yes |
| AREA OF RESPONSIBILITY                    |  |               | TOTAL PERCENT    |
| V. Papyrus Software Suite Training Expert |  |               | 15%              |
|   | Act as a training expert for campus software solutions, focused on records information management. Analyze needs and develop software training to fit the needs of campus faculty and staff  | Percent<br>6% | Essential<br>Yes |
|   | Act as a subject matter expert in the deployment of new solutions, creating training materials and ensure best practices in efficiency, cost effectiveness and usability.  | Percent<br>4% | Essential<br>Yes |
|   | Liaisons with departments / units to oversee the transfer of inactive records as appropriate. Provide scheduling and training for staff assigned to the function.  | Percent<br>3% | Essential<br>Yes |
|   | Work on records management solutions for various campus clients, including providing guidance to internal Information Technology specialists on specific RIM standards, practices and principles.  | Percent<br>2% | Essential<br>Yes |
| Knowledge, Skills and Abilities           |  |               |                  |
|   | DESCRIPTION  | IMPORTANCE    |                  |
| A   | Knowledge of records management principles and practices. Knowledge of records information management principles and standards. Ability to recommend formats for records collections, including electronic filing systems, optical imaging, microfilm and various media.   | Required      |                  |
| B   | Limited experience with automated storage and retrieval systems, and electronic records.   | Required      |                  |
| C   | Demonstrated experience with Microsoft Office Suite and general office applications. Intermediate (or higher) level of proficiency with MicroSoft suite, including Visio, Presentations, Word, Excel and software used in document scanning, forms development, and electronic content management systems.   | Required      |                  |
| D   | Demonstrated customer service skills. Demonstrated ability to assess problems and suggest solutions, and to implement innovative changes and improve systems. Demonstrated ability to implement assess needs, develop and and disseminate training materials incorporating established policy guidelines. Strong oral and written communication skills. Ability to write and speak clearly and present detailed information and analysis.  | Required      |                  |
| E   | Ability to handle challenging situations with tact and diplomacy. Excellent interpersonal skills with the ability to interact in a positive manner with diverse clientele, including, prominent social and business figures, elected officials, and campus administrators, faculty, staff and students using a high degree of tact, diplomacy and discretion, with emphasis on flexibility and discretion.   | Required      |                  |
| F   | Ability to work independently, handling multiple priorities and meeting established timeframes.  | Required      |                  |
| G   | Strong organizational skills and ability to multi-task with demanding timeframes. Demonstrated skills and techniques to recognize problem issues and situations and apply resourcefulness in finding appropriate solutions to implement problem solving to mitigate potential negative effects and follow-through to ensure effective resolution. Ability to provide leadership in addressing complex and sensitive problems/matters. Exceptional organizational skills in order to prioritize independent function and workload, meet deadlines, and work in an environment of heavy pressures and changing priorities. | Required      |                  |
| H   | Ability to use a high level of discretion and maintain all confidentiality.  | Required      |                  |
| I   | Extensive knowledge and skill in creating executive level report writing, correspondence communications, including proper formats, clarity, grammar and style in preparing a broad variety of written materials. Able to analyze, synthesize and extrapolate information and convey it for optimum clarity. Ability to research special studies/projects involving complex data analysis sets compile data and reports.  | Required      |                  |
| J   | Demonstrated business and administrative analysis experience, including strong office management   | Required      |                  |

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|   | skills.   |           |
| K | Broad knowledge of software solutions pertaining to Records and Information Governance, including capture, imaging, forensics, reporting tools, and cost-effective measures; and the ability to disseminate this information to stakeholders. | Required  |
| L | Demonstrated skills in Internet research and query tools to extract information from websites   | Preferred |
| M | Bachelor's degree or equivalent combination of education and work experience; business, public administration or related field preferred.   | Preferred |
| N | Broad knowledge of UCSD's administrative structure and functions, policies, procedures and practices. Understanding of UCSD's business, accounting, personnel, travel, and procurement practices.   | Acquired  |
| O | Demonstrated skills in business process modeling and transactional efficiencies in workflow design. Introduction to Six Sigma continuous process improvement practices.   | Acquired  |

**Environment****PHYSICAL ACTIVITIES**

|                                |                               |                                |                                 |
|--------------------------------|-------------------------------|--------------------------------|---------------------------------|
| Standing: Occasionally         | Crawling: Occasionally        | Bending: Occasionally          | Walking: Occasionally           |
| Climbing: Occasionally         | Kneeling: Occasionally        | Sitting: Frequently            | Reaching: Occasionally          |
| Balancing: Occasionally        | Seeing: Constantly            | Keying: Frequently             | Feeling: Frequently             |
| Talking: Frequently            | Hearing: Constantly           | Handling: Occasionally         | Lifting 0-20 lb: Occasionally   |
| Lifting 20-50 lb: Occasionally | Lifting 50+ lb: Never         | Carrying 0-20 lb: Occasionally | Carrying 20-50 lb: Occasionally |
| Carrying 50+ lb: Never         | Pushing 0-20 lb: Occasionally | Pushing 20-50 lb: Occasionally | Pushing 50+ lb: Never           |

**MENTAL ACTIVITIES**

|                                  |                       |                         |
|----------------------------------|-----------------------|-------------------------|
| Reading: Frequently              | Writing: Frequently   | Calculating: Frequently |
| Communicating Orally: Frequently | Reasoning: Frequently | Analyzing: Constantly   |

**ENVIRONMENTAL CONDITIONS**

|                                 |                             |                           |
|---------------------------------|-----------------------------|---------------------------|
| Confined Areas: Rarely          | Exposed to Weather: Rarely  | Noise Exposure: Rarely    |
| Vibrations: Rarely              | Extreme Temperatures: Never | Potential Hazards: Rarely |
| Fumes/Odors/Mists/Dusts: Rarely | Potential Allergens: Rarely | Work Inside: Constantly   |
| Work Outside: Rarely            | Other:                      |                           |

**Signatures for Printed Copy****A. SAFETY**

Based on Labor Code Section 6401.7 it is expected that all employees know and practice all appropriate safety methods and procedures.

**B. PAYMENT OF OVERTIME**

If this position is designated as eligible for premium overtime and is not subject to any collective bargaining agreement, overtime may be paid by either compensatory time off or cash at the option of the department, unless agreement to this effect is not reached, in which case pay shall be provided.

**EMPLOYEE'S SIGNATURE**

I certify that the above description is correct, complete and describes my job as I understand it.

I have read both the Safety and Overtime Payment statements.

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**SUPERVISOR'S / DEPARTMENT HEAD'S SIGNATURES**

I have reviewed the job description and the above statements and certify to their accuracy.

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Dept. Head's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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