



For the future of every student

## **CLASS TITLE: RECORDS SPECIALIST**

### **BASIC FUNCTION:**

Under the direction of the Director of Student Support Services, perform a variety of specialized duties in the organization, storage and maintenance of active and inactive cumulative student records for the District; provide information, assistance and transcripts to former students, school personnel, outside agencies and others according to established guidelines and procedures.

### **ESSENTIAL DUTIES & RESPONSIBILITIES**

*Incumbents may perform any combination of the essential functions shown below. This classification specification is not intended to be an exhaustive list of all duties, knowledge or abilities associated with this classification, but is intended to accurately reflect the principle job elements.*

Perform a variety of specialized duties in the organization, storage and maintenance of inactive student records for the District; establish and maintain filing systems of cumulative student records; log incoming and outgoing cumulative records; input student information into assigned database system, run queries, summarize data and compile reports; assure procedures and practices comply with established laws, rules and regulations.

Provide information, assistance and cumulative student records to students, school personnel, outside agencies and others according to established guidelines and procedures; respond to oral and written transcript requests; duplicate and distribute cumulative student records; verify student information as requested; prepare and distribute related correspondence.

Receive, sort and organize incoming permanent and interim student records; review records for accuracy and completeness; contact District personnel and outside agencies to request missing information; notify the State of new students to obtain State identification number; receive and verify identification numbers from the State according to established procedures.

Prepare student records and verify accuracy of permanent student files for scanning according to established guidelines and procedures; remove records that can be destroyed and assure State-mandated records are retained in folders; contact scanning and shredding agencies as needed.

Utilize a microfilm reader to retrieve archived information; print microfilmed materials according to established procedures; assure accuracy and completeness of requested materials.

Receive, process and evaluate foreign transcripts for students from other countries to District schools; complete related paperwork and submit to appropriate outside agency for translation and evaluation.

Communicate with District personnel, employers, schools, courts, law enforcement agencies and various outside organizations to exchange and verify information, coordinate activities and resolve issues or concerns.

Provide school site and district staff with training and support in the area of proper office procedures regarding records management, maintenance, retention, access and disposal; provide work direction and

guidance to assigned personnel; review work to assure accuracy, completeness and compliance with established requirements; drive a vehicle to District sites to conduct trainings.

Receive, open, sort, screen and distribute incoming mail as assigned; prepare outgoing mailings of student records; prepare, maintain, process and distribute documents (e.g. correspondence, forms, requisitions, reports, etc.) to provide complete and accurate information to district personnel, students, parents, outside agencies and the public; create spreadsheets for daily record-keeping of student records, fee logs, and other related records activities; perform a variety of clerical accounting duties as required.

Receive cumulative records for incoming students and distribute to appropriate personnel; file test scores, report cards, special education information and other pertinent information into the student's cumulative record.

Operate standard office equipment including a copier, fax machine, scanner, computer and assigned software.

Attend a variety of meetings as assigned; plan and facilitate committee meetings regarding records; reserve facilities and arrange meeting date and times; prepare agendas and other meeting materials.

Perform other duties as assigned that support the overall objective of the position.

#### **KNOWLEDGE AND ABILITIES:**

##### **KNOWLEDGE OF:**

Principles and methods of records maintenance, storage and retrieval.

Numerical, alphabetical and subject matter filing systems.

Oral and written communication skills.

Correct English usage, grammar, spelling, punctuation and vocabulary.

Applicable, laws, codes, regulations, policies and procedures.

Telephone techniques and etiquette.

Transcript evaluation, maintenance and processing methods, procedures and guidelines.

Interpersonal skills using tact, patience and courtesy.

Modern office practices, procedures and equipment.

Operation of a computer and assigned software.

Methods of collecting and organizing data and information.

Data control procedures and data entry operations.

Mathematical calculations and proper cash handling.

##### **ABILITY TO:**

Perform a variety of specialized duties in the organization, storage and maintenance of active and inactive cumulative student records for the District.

Provide information, assistance and transcripts to former students, school personnel, outside agencies and others according to established guidelines and procedures.

Interpret, apply and explain rules, regulations, policies and procedures.

Learn to operate a variety of optical imaging equipment including scanners, printers and microfilm readers.

Operate standard office equipment including a computer and assigned software.

Manage and maintain data using designated database systems and spreadsheet software.

Maintain accurate and complex sets of records and reports consistent and compliant with defined requirements.

Complete work with many interruptions.

Lead, guide and train assigned staff.  
Maintain the privacy of student records and information.  
Establish, organize and maintain filing systems.  
Communicate effectively both orally and in writing.  
Establish and maintain cooperative and effective working relationships with others.  
Understand and follow oral and written directions.  
Maintain regular and consistent attendance.  
Review materials for accuracy and completeness.  
Work independently with little direction.  
Meet schedules and timelines.  
Must be able to interact with a diverse community in formal and informal contacts with courtesy and patience.

**EDUCATION AND EXPERIENCE:**

Requires any combination of education, training and/or experience equivalent to graduation from high school and three years increasingly responsible clerical experience which demonstrates the knowledge and abilities as listed above, including one year providing administrative support in data entry and reporting, and maintenance of student records.

**LICENSES AND OTHER REQUIREMENTS:**

A valid California driver's license.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Indoor work environment.  
Constant interruptions.

**PHYSICAL DEMANDS:**

Dexterity of hands and fingers to operate a computer keyboard.  
Hearing and speaking to exchange information in person and on the telephone.  
Seeing to read a variety of materials.  
Sitting or standing for extended periods of time.  
Bending at the waist, kneeling or crouching to file materials.  
Lifting, carrying, pushing or pulling moderately heavy objects as assigned.

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Approved by Personnel Commission: 06/18/2008  
Revised: 04/19/2017