



THE STATE BAR OF CALIFORNIA

OFFICE OF HUMAN RESOURCES

845 SOUTH FIGUEROA STREET, LOS ANGELES, CA 90017-2515 (213) 765-1100 • 180 HOWARD STREET, SAN FRANCISCO, CA 94105-1639 (415) 538-2351

COORDINATOR OF RECORDS

Office: Multiple
Status: Non-Exempt – General Unit
Grade: 5

ORGANIZATIONAL RELATIONSHIPS

Reports to: Senior Administrative Assistant
Supervises: None

DEFINITION

The Coordinator of Records (CR) coordinates the creation, organization and maintenance of all records, for the particular office, including the input of all data-base information, record(s) tracking, determining appropriate action for a wide range of requests and performs various clerical and support activities.

MAJOR DUTIES & RESPONSIBILITIES

1. The CR is responsible for following the Office and State Bar's record management policies and procedures, assuring accuracy of coding, indexing, filing, controlling and maintenance of files, records and documents.
2. The CR may review all incoming information to determine action.
3. The CR may coordinate logging in of case data and/or documents, file set up, assign appropriated file identification in accordance with the data system utilized in the particular Office.
4. The CR may be responsible for the preparation and servicing of subpoenas for records and documents from the courts, financial institutions and law offices.
5. The CR may process and determine the appropriate action for written requests for copies of files and/or file documents, and compile and maintain case records and statistics, and prepares appropriate reports.
6. The CR may respond to inquiries and prepare basic correspondence, reports and/or other requested materials.
7. The CR may be responsible for retrieving, distributing, combining and destruction of files in accordance with policy and procedures of the particular Office.
8. The CR may be responsible for specialized clerical procedures including the coordination of the production and distribution of projects and performing basic research.
9. The CR may perform a number of other similar or related duties which may not be specifically included within this position description, but which are consistent with the general level of the job and the responsibilities described.

KNOWLEDGE & SKILLS

COORDINATOR OF RECORDS

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1. Computerized information and database record keeping systems.
2. Record management procedures and filing systems.
3. Standard office procedures.
4. The basic rules of vocabulary, grammar, spelling and punctuations as specified in Webster's New Collegiate Dictionary.
5. Business math for completing non-technical calculations such as addition, subtraction, multiplication and division.
6. Basic techniques of record and file organization.
7. Within the introductory period, obtain a working knowledge of the State Bar and the function of the Office to which assigned
8. Data assembly and report preparation.

ESSENTIAL ELEMENTS / ABILITY TO

1. Digital dexterity to assemble, retrieve and replace files.
2. Receive and relay detailed information through verbal and/or written communications.
3. Communicate by telephone.
4. Possess visual capability and digital dexterity to operate a computer and other standard office equipment.
5. Make fine visual distinctions upon proofreading written documents and viewing information on a computer screen.
6. Communicate clearly and effectively in person and in writing.
7. Endure long periods of sitting.

MINIMUM QUALIFICATIONS

1. High school diploma or equivalent and
2. Minimum two (2) years post-secondary education and
3. Minimum one (1) year directly relevant experience in records management or
4. Minimum (3) years directly relevant experience in records management including equivalent work experience in a position which requires performance of tasks similar to the major duties and responsibilities of the position and
5. Successful completion of the State Bar validated standard tests for the position and
6. Accomplished computer keyboarding skills.

Revised November 2015