



POSITION	Records Clerk	REPORTS TO	Financial Services Director
DEPARTMENT	Financial Services	FLSA STATUS	Non-Exempt
EFFECTIVE DATE	10/17/2022	REVISED DATE	10/17/22

## DESCRIPTION

### RECORDS CLERK

#### SUMMARY

Under supervision of the Financial Services Director, the position performs basic records management duties related to financial records for the Village of Indiantown. These duties include copying, scanning, and indexing, and working with the Village Clerk's Office to archive or destroy paper records in accordance with applicable record retention laws. The incumbent filling this position will be working primarily with staff in the Financial Services Department and the Village Clerk's Office. On occasion, the candidate filling this position may need to work with both internal and external customers of the Village, including department staff, department directors, members of the Village Council, vendors, and other points of contact within external local government and state agencies.

#### ESSENTIAL FUNCTIONS

*Duties may include, but are not limited to, the following. The omission of an essential work task does not preclude management from assigning duties or tasks not listed if such functions are a logical assignment to the position:*

- Scans paper financial records into electronic document management system; indexes financial records using defined key words for electronic records retrieval, reporting, and records retention purposes.
- Performs record searches and pulls and delivers paper records as needed.
- Assists with oversight and maintenance of departmental records inventory; monitors financial records and assists Clerk's Office in assigning and tracking records retention and destruction schedules.
- Conducts research and resolves discrepancies with assigned records; escalates issues to staff or to the Financial Services Director for resolution as required.
- Assists with creating and maintaining documented processes and procedures for position duties as required and approved by the Financial Services Director; maintains logs and schedules for individual and department function tasks.
- Communicates and responds to requests for status updates and general inquiries; follows up and resolves issues in a timely manner.



- Comfortable with leveraging technology to maximize the efficiency, consistency, and accuracy of assigned areas of responsibility; assists with helping develop business process workflows and business process improvement; participates as required in the testing of newly implemented or upgrades in information systems related to financial services.
- Demonstrates critical thinking and applies principles of sound logic; identifies and defines problems, obtains empirical evidence, and draws valid conclusions.
- Maintains consistent lines of communication with management and staff with changes and developments within areas of awareness and assignment; escalates issues to the attention of management in a timely manner, as appropriate and as conditions warrant.
- Maintains established organizational/departmental productivity standards.

#### MINIMUM QUALIFICATIONS

##### Education, Training and Experience Guidelines:

- Minimum High School Diploma or GED.
- Six (6) months of recent and relevant experience with filing, scanning, and recordkeeping; work with electronic document management systems is highly preferred.
- Education and experience may be substituted on a year for year basis to meet the above qualifications.

##### Knowledge of:

- Business math, English, grammar, writing and editing skills; and business correspondence protocol.
- Modern office terminology, methods, practices, and procedures.
- Prior knowledge of municipal and departmental rules, regulations, practices, and procedures and basic state laws pertaining to local governments (i.e. Sunshine Law and Public Records Laws) is highly preferred.
- Prior knowledge of electronic and paper records management best practices is highly preferred.

##### Skill in:

- Multi-task and organize a dynamic workload and schedule.
- Maintain quality control and poise and courtesy under the pressures of deadlines or demanding public customers.
- Understand and follow oral and written instructions.
- Establish and maintain effective working relationships with fellow employees, Village Council Members, consultants, the general public, and other potential partner governments.
- Perform basic math calculations; with spreadsheet proficiency being highly desired.
- Learn pertinent codes, laws, ordinances, rules, regulations, policies, and procedures.
- Clearly communicate and convey information tactfully and impartially.



- Able to operate modern office equipment and various computer software.
- Maintain confidentiality when necessary.

Ability to:

- Maintain reasonably regular punctual attendance consistent with the ADA, FMLA, other federal state and local standards, and the Village's attendance policies and procedures.
- Come to work and work the regular schedule and shift for the position.
- Comply with all personnel policies and procedures.

**LICENSE AND CERTIFICATION REQUIREMENTS**

- Must possess a valid Florida driver's license upon hire and maintain throughout the length of employment with the Village of Indiantown.

**WORKING ENVIRONMENT**

- Work is performed primarily in an indoor office environment.

**PHYSICAL AND MENTAL DEMANDS**

Emotional/Psychological:

- Basic decision-making and periodic multi-tasking required; occasional to frequent working alone; and occasional to frequent contact with the public and elected officials, sometimes encountering angry or upset patrons or citizens.

Mobility:

- Frequent standing, sitting, or walking for extended periods; occasional pushing, pulling, or lifting of up to 25 pounds; and occasional reaching, bending, kneeling, stooping, and squatting.
- Occasional balancing, turning, and climbing.

Dexterity:

- Frequent repetitive motion from writing, using a computer keyboard for extended periods of time, grasping, holding, and reaching.
- Standard dexterity in the use of fingers, limbs, or body in the operation of office equipment.

Vision:

- Constant use of good overall close and distant vision.
- Frequent use of color perception, hand/eye coordination, and depth perception; occasional use of peripheral vision.



Hearing/Talking:

- Frequent hearing/talking to others on the telephone and in person; frequent hearing of faint sounds and occasional hearing of loud sounds.

**PROBATIONARY PERIOD**

This position is subject to the successful completion of a six (6) month probationary period.

**VILLAGE EXPECTATIONS**

Certain essential village services are required to be maintained in any civil emergency (i.e., hurricanes). Depending upon the type of emergency, **any and all** employees may be activated as essential employees in the event of an emergency. Depending on the nature of the emergency, employees may be called upon to perform tasks outside of their daily duties.

Accepted by: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_