

**Department of Consumer Affairs**

Position Duty Statement

HR-041 (new 5/04)

<b>Classification Title</b>	<b>Board/Bureau/Division</b>
Business Service Officer I	Medical Board of California
<b>Working Title</b>	<b>Office/Unit/Section / Geographic Location</b>
Business Service Officer I	Business Services Office/Sacramento
<b>Position Number</b>	<b>Effective Date</b>
629-150-4720-tbd	

Under the general supervision of the Staff Services Manager I, the incumbent is a member of the Business Services Office and works closely with the assigned programs/field offices of the Medical Board of California (MBC). The Business Service Officer (BSO) I independently performs the various technical and analytical business services duties, responsibilities, with a high degree of initiative and originality. The incumbent researches, reads, analyzes, interprets and applies applicable Department of Consumer Affairs (DCA), Department of General Services (DGS), State Administrative Manual (SAM) and control agencies rules, policies and procedures, in order to ensure appropriate laws, rules, and procedures are being followed, relating to business services operations.

A. SPECIFIC ASSIGNMENTS [Essential (E) / Marginal (M) Functions]

**40% Purchasing and Procurement (E)**

- Receives purchasing requests; evaluates and determines the purchasing needs of staff through receipt, analysis and reconciliation of purchase requests. Projects and orders supplies for the entire Board prior to the end of the fiscal year to ensure supply orders can be filled if budget is not approved timely. Reviews, analyzes, applies policy, approves/denies and processes purchase, service and supply orders; obtains and awards bids to select the most cost-effective vendor to meet the needs of the Board; ensures small and disabled veteran business enterprises are solicited. Evaluates and determines purchase alternatives through the analysis and interpretation of applicable state laws, rules and regulations, such as the DGS, SAM and DCA policies and procedures. Ensures the purchasing process, documentation, review and approval/denial of purchases is accurate, complete, and in compliance with all applicable purchasing mandates, rules, regulations, policy and procedures. **(20%)**
- Writes clear and concise justifications and specifications for all purchases. Consults with, and serves as a liaison between BSO and MBC programs/field offices to ensure appropriate steps and requirements are followed when purchasing equipment and supplies. Analyzes changes in state laws, rules and regulations in regard to purchasing and consults with management regarding the potential impact to the Board. **(15%)**
- Prepares, maintains, tracks and monitors all purchase requests/orders submitted to DCA; ensures quotes are refreshed, statement of work is complete and items are still available. develops, maintains and updates BSO databases/spreadsheets to track purchases/orders, costs, volume and to ensure security and efficient use of materials. Prepares adhoc reports for the MBC Budget Analyst to be used for projections and various reports for Executive Management, Board members and the annual report. **(5%)**

**20% Equipment and Supplies (E)**

- Receives, processes and authorizes orders in accordance with state and departmental policy, rules and regulations; verifies and delivers/ships orders upon receipt. Maintains inventory of all supplies, pamphlets, law books, forms, etc, anticipating Board needs and initiates orders based on knowledge and history of program needs. Maintains reasonable inventory levels required for

MBC operations in a neat, organized, hazard-free condition, including rotating stock and appropriate disposal of obsolete supplies. Maintains inventory log of MBC equipment, such as printers, fax machines and copiers including their location and toner usage. Ensures accurate and appropriate toners are ordered and in stock at all times for each office. Arranges and coordinates disposal of used toner and print cartridges. **(5%)**

- Receives minor and major equipment purchase requests; researches and analyzes options available; makes preliminary decisions on which product or brand will be most cost effective and best utilized. Prepares and provides complete detailed alternatives and recommendations to management for approval. Prepares purchase justifications and specifications in order to solicit bids to vendors via e-mail or phone. **(5%)**
- Receives, issues and stores furniture, minor equipment and the aforementioned supplies. Maintains and updates inventory tracking database of all MBC property (faxes, printers, furniture, equipment etc.) including pertinent information/history such as location, model, serial number, replacement toner/cartridge information, purchase date, history and useful life expectation history; ensures all MBC equipment and furniture is properly labeled per the SAM manual prior to delivering tagged property. Prepares survey property requests; determines proper disposal of equipment by identifying condition of equipment, utilizing knowledge of disposal options using e-waste, DGS-approved donation recipients and DGS re-utilization. **(5%)**
- Maintains and monitors the Board's "Cal Card", to ensure all purchases are made within the parameters and guidelines set by State and departmental policy. Utilizes officially-assigned Cal Card account (limit up to \$10,000.00) for purchasing consumable goods in accordance with DGS, SAM and DCA policies and procedures. Receives, verifies and reconciles Cal Card monthly statements against purchase receipts, confirms charges are consistent with original purchase quote(s); ensures approved statement includes all required back-up documentation and submitted to the DCA Accounting Office timely for payment processing. Works directly with vendors to resolve any discrepancies between amounts charged to Cal Card, goods received and purchases receipt/billing. **(5%)**

#### **15% Support Services (E)**

- Maintains knowledge of all MBC building(s) card key systems. Issues, deletes and maintains MBC ID cards/card key system for new hires, separations and existing MBC staff; creates and changes access levels. Troubleshoots system problems and attempts to remedy situation before contacting vendor. Maintains up-to-date logs of card key assignments, requests, deletions, modifications, etc. **(5%)**
- Receives, opens, date stamps, sorts and scans (using MBC internal database) incoming mail, including: departmental interoffice, express, certified and registered mail; delivers mail to the appropriate unit; prints daily receipt and delivery log from the database for all incoming express, certified and registered mail and obtains receiver's signature; remains watchful of suspicious incoming items and notifies management and law enforcement of any concerns. Receives, researches and resolves mail desk discrepancies timely and accurately. Performs a weekly manual mail count of all incoming mail during first full week of each month and provides the numbers to the MBC Budget Analyst. Assists MBC staff with reproduction options/requests. Researches and contacts Office of State Publishing, DCA or outside vendors for information on options for various reproduction orders, enforcement exhibits for court records and duplicating interview recordings. Acts as liaison with the United States Postal Service and other mail vendors. **(5%)**
- Maintains and performs random testing and inspection of equipment, accessories, cables and wiring to ensure the equipment is operational; schedules routine preventative maintenance with warranted/contracted vendor(s). Makes arrangements for shipping or transportation of equipment to and from meeting sites. Travels and attends board and committee meetings held in various locations throughout California; sets up, tests and adjusts sound equipment for quality of recordings and volume to ensure copies of recordings will be clear enabling staff to transcribe minutes which must be approved at subsequent board and committee meetings; prepares for and performs emergency repairs to the equipment and cabling; operates and takes down sound and

recording systems; makes copies of compact discs from disc/digital recordings of meetings for MBC staff. **(5%)**

**10% Auditing and Reconciliation of Goods and Service Records (E)**

- Receives, reviews and researches all invoices for accuracy including: telephone services, shipping services, court reporting, copy services, etc. Works closely with the assigned programs/field offices staff to verify and validate charges to the correct account code. Contacts MBC staff and vendors to resolve any discrepancies prior to approval/denial. Submits invoices to DCA Accounting Office, in a timely manner, to pay invoices by due dates to avoid disruption of services and late penalty fees. Maintains and updates BSO database/spreadsheet to track invoices, DCA processing and payment to vendors. Prepares adhoc reports for the MBC Budget Analyst to be used for projections and various reports for Executive Management, Board members and the annual report. **(5%)**
- Negotiates and coordinates with vendors regarding products, arranges for adjustments and/or returns for wrong, damaged or substandard merchandise. Conducts thorough reviews and prepares written documentation of substandard vendor performance or merchandise. Works with vendors to guarantee merchandise ordered meets the requestor's specifications, obtain expected delivery date(s), ensure purchases are received and continually communicates order status with MBC staff member(s). Composes clear and concise correspondence to vendors regarding billing/invoices, bids, awards, supplies, schedules, and discrepancies. **(5%)**

**5% Facility Management and Building Maintenance (E)**

- Acts as the Liaison between MBC, the DCA and the applicable property management company. Receives and evaluates complaints and requests for work/maintenance. Performs analysis of situations to determine who should be contacted to complete the work/repairs. Reports complaints to the appropriate property manager and/or repair company. Contacts vendors for improvements and repairs to office space. Ensures all building maintenance, janitorial services, and heating/air conditioning needs are performed as needed. Maintains logs of all maintenance issues and ensures work has been done timely and satisfactorily. Coordinates projects with multiple parties. Negotiates problem resolution with property manager according to lease interpretation and party responsibility for repairs. Ensures MBC management is kept up-to-date regarding building issues involving their office/staff. Assists in design of space allocation within the MBC buildings, including the coordination of staff movement and modular furniture reconfiguration. Orders office and modular furniture. Schedules and monitors furniture changes, deliveries and installation.

**5% Telecommunications (E)**

- Maintains inventory/supplies of landline and cellular telephones/accessories; issues cellular/landline telephones and accessories to MBC staff. Maintains knowledge and record keeping of the various telephone systems in each MBC location and district office. Provides liaison services to troubleshoot problems prior to reporting them to the provider and/or DCA Telecom for resolution. Identifies, provides specifications, and assists DCA Telecom and provider/vendor on design and operational needs for specific offices. Accesses "CALNET II" portal to make changes and add or remove specific features. Communicates with applicable vendors/providers regarding specific needs, questions or problems. Monitors usage of devices and reviews monthly invoices for areas of concern or inaccuracies.

**5% Special Projects and Assignments (E)**

- Conduct and/or assist with special projects in order to evaluate problems, procedures, methods, and policies for the purpose of providing assistance and possible recommendations to the Board's Business Services Office, which may collaboratively assist with accomplishing the Board's objectives. Perform other job-related duties and provide back-up assistance to other BSO staff in the office, as required.

- B. Supervision Received  
The incumbent works under the general supervision of the Staff Services Manager I.
- C. Supervision Exercised  
None
- D. Administrative Responsibility  
None
- E. Personal Contacts  
The incumbent will have direct frequent contact with the SSM I for project updates and assignments. The incumbent has direct daily contact with other Medical Board staff, Management, Executive staff and all field offices in order to carry out daily Board related business such as supplies, purchases, maintenance and equipment issues; works directly with MBC's Budget Analyst providing data used by management, Board members and included in the annual report. The incumbent has direct regular contact with vendors, facilities management, various state agencies, Department of Consumer Affairs, Department of General Services and public and private vendors.
- F. Actions and Consequences  
Failure to perform duties adequately could result in the Board not operating efficiently and effectively; disruption of the day-to-day operations could negatively impact staffs ability to acquire the equipment and office supplies needed to accomplish their respective duties and responsibilities that may lead to a breakdown in administrative and program functions throughout the Board may ultimately impact the Board's ability to carry out its mission to protect California Healthcare Consumers through proper licensure and enforcement of physicians, surgeons and certain healthcare professions.
- G. Functional Requirements  
The incumbent works 40 hours per week in an office setting, with artificial light and temperature control. Daily access to and use of a personal computer and telephone is essential. Sitting and standing requirements are consistent with office work. The incumbent must have the ability to lift and move heavy boxes weighing 25 – 30 pounds, audio visual equipment cases weighing up to 150 pounds (with the assistance of a co-worker) and the various other large, heavy and awkward items associated with job responsibilities. Travel is required to attend Board and Committee meetings and district offices throughout California. The incumbent is required to travel by commercial carrier or auto whichever method is in the best interest of the State. Travel may be for one or several consecutive days.
- H. Other Information  
The incumbent must possess excellent analytical and reasoning skills, customer service and written and verbal skills. The incumbent must possess the ability to; work independently with a high degree of initiative and good judgment in decision making, exercise creativity and flexibility in problem identification and resolution, produce high-quality completed staff work, establish and maintain a strong professional rapport with vendors to facilitate effective communication and manage time and resources effectively.

As a member of the BSO team it is essential for the incumbent to have a positive attitude, be dependable and have consistent attendance. The BSO must be responsive to Board staff, Board and Committee Members and DCA's requests and needs. The incumbent may be privy to sensitive/confidential documents and/or materials; therefore, the incumbent is expected to use discretion, maintain privacy and confidentiality.

Title 11, section 703D California Code of Regulations requires criminal record checks of all personnel who have access to Criminal Offender Record Information (CORI). Pursuant to this

requirement, applicants for this position will be required to submit fingerprints to the Department of Justice and be cleared before hiring.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety analyst.)

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Employee Signature

Date

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Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

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Supervisor Signature

Date

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Printed Name

**New: cw 7/12**  
**Revised: cz 05/14**  
**Approved: jm 5/14**