

Business Service Officer I (Specialist)

Essential Task Rating Results

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| 1. | Authorize all purchases for department's operating needs through Master Service Agreements, Cal Cards, and through the 277 purchase order process by reviewing for pricing feasibility, office needs etc. before providing signature and submission. |
| 2. | Place, prepare and process purchase requests for office and communications equipment (e.g. signs, rubber stamps, business cards, investigator ID cards, calling cards, furnishings) to supply the needs of the department. |
| 3. | Initiate and coordinate the procurement process for facility related procurements, including contacting vendors, researching product information, and repairing related procurements, office and conference room furniture and audio/visual equipment. |
| 4. | Monitor the purchases and contract functions that provide for the procurement of equipment and commodities for the department in accordance with Purchasing Authority Manual (PAM) or other department manuals. |
| 5. | Provide all appropriate documentation to customers, procurement supervisors, and/or business service staff to facilitate the procurement process, justify purchases, and supply needs. |
| 6. | Complete, copy, and submit purchase orders to appropriate personnel for procurement process approval, and to the purchasing authority for payment, and file purchase order documentation for office records. |
| 7. | Prepare purchase estimates for items that are above Contract Delegation Authority amount and gain approval from the purchasing authority and/or appropriate funding sources. |
| 8. | Develop and document processes and procedures for the request and procurement of new or replacement facility related equipment to provide business service office staff with operations guidance. |

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| 9. | Review service and non-service orders for completeness, feasibility and compliance. |
| 10. | Review prepared requisition requests, checking for content (e.g. funding code, justification, items being requested), respect to costs, completeness (including taking steps to acquire necessary information for incomplete forms), in compliance with the State Administrative Manual (SAM) or other purchasing policies before forwarding to management for budgeting approval. |
| 11. | Review logs, shipping and delivery receipts, and accounting documents for non-receipt of order to track and maintain inventory. |
| 12. | Review and approve invoices for maintenance and rental contracts in accordance with the State Administrative Manual (SAM) or other purchasing policies. |
| 13. | Evaluate requests (e.g. new equipment, service) against the standard and existing inventories and identify alternatives to purchasing new materials |
| 14. | Review client and vendor status and performance for compliance with regulations, policies and procedures and distribute instructions, guidelines, and requirements. |
| 15. | Verify that the purchase document reflects the recycled-content mandated by CalRecycle according to established policies and procedures. |
| 16. | Develop service agreements and contracts in coordination with vendors to provide warranties for equipment repairs and services. |
| 17. | Write specifications for supplies, rental equipment, maintenance contracts, and alteration of facilities (including office moves) to meet supply needs, efficiently use available space/resources, and maintain compliance with the Department of General Services policies or other applicable authorities. |
| 18. | Develop justifications for contracts to justify needs of expenditures, to comply with department's mission critical statement in accordance with procurement procedures. |

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| 19. | Review contracts for compliance with State policies and regulations, to ensure that the scope of work is completed, and that required documents are included. |
| 20. | Develop the scope of work to be performed to specify contract service requirements prior to the bidding process. |
| 21. | Secure price quotes from vendors to determine vendor costs and award the purchase to the most qualified vendor in terms of price, service, timeframe, product availability and business qualifications. |
| 22. | Solicit bids by gathering relevant specifications, and placing recommendations and proposals for procurements. |
| 23. | Determine efficient storage methods for maintaining organization and inventory of equipment. |
| 24. | Monitor and regulate property disposal to maintain detailed records of equipment by inspecting equipment and justifying disposal before submitting notice to the state for approval. |
| 25. | Ensure that proper procedures are being followed in receiving and decaling capitalized assets and sensitive equipment, which includes tracking the acquisition value of all components for each purchase, description, serial numbers, model numbers, location, and reporting unit to which it is assigned. |
| 26. | Prepare documents for decaling, transferring, or surveying capitalized and sensitive equipment. |
| 27. | Log, monitor and track equipment inventory using detailed records to identify available departmental resources for maintaining office operations (e.g. furniture moves, cubicle reconfiguration, shipping services). |
| 28. | Research, reconcile, and rectify inventory discrepancies by conducting a physical inventory, referring to supporting documents (e.g. weekly physical inventory cycle count, database), initiating an inventory adjustment, and administering another cycle count. |
| 29. | Coordinate the timely reordering and restocking of required materials to ensure sufficient supplies are readily available. |

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| 30. | Verify and document the receipt of equipment prior to submission of payment to ensure proper requisition of goods and services. |
| 31. | Secure services and repairs for department equipment by gathering information regarding service requests, completing maintenance request service forms, and contacting vendors and submitting invoices for approval. |
| 32. | Prepare and update operations manuals by researching, interpreting and analyzing the State Administrative Manual (SAM) and applicable rules and regulations to maintain departmental compliance and uniformity. |
| 33. | Plan/Prepare, submit, and distribute reports (e.g. security, maintenance, accounting, annual, energy conservation) to keep accurate records (e.g. number of transactions in a specified amount of time) and document processes and activities using spreadsheet software. |
| 34. | Track and monitor the completion of mandatory reports by reviewing reports for content, quality, and format to ensure completion within necessary timelines. |
| 35. | File documentation (e.g. contracts, service orders, tickets, travel expense claims) to maintain proper records of all business service operations. |
| 36. | Develop spreadsheets summarizing information (e.g. requisitions, payments) used for reference purposes in audits and reports. |
| 37. | Develop and maintain filing systems (e.g. electronic, manual) using various filing methods (e.g. numerical, categorical, alphabetical). |
| 38. | Collect data for departmental functions (e.g. purchase estimates from vendors, printing requests, material requests) for cost analysis and decision making purposes by viewing online or paper catalogs. |
| 39. | Research products (e.g. office supplies/equipment, costs) and services to determine if they meet departmental needs, make recommendations to management, and obtain documentation which substantiates proposed purchases. |

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| 40. | Respond to requisition requests by soliciting vendors for quotes, comparing vendors on numerous dimensions including price, availability and product quality to determine appropriate selection. |
| 41. | Determine work priorities, scope of assignments and establishes deadlines for work to insure objectives are met effectively and in a timely manner. |
| 42. | Prioritize the handling of problems or issues related to the progress of work projects or assignments to determine the best course(s) of action to mitigate the impact of such issues and/or problems. |