

Meeting Location: Board of Supervisors Chambers
575 Administration Dr., Ste. 104A
Santa Rosa, CA 95403

CIVIL SERVICE COMMISSION

Thursday, May 16, 2019

Disabled Accommodation: If you have a disability which requires an accommodation, an alternative format, or requires another person to assist you while attending this meeting, please contact Marissa Georges at (707) 565-6195, as soon as possible to ensure arrangements for accommodation.

Materials related to an item on this Agenda submitted to the Commission after distribution of the agenda packet are available for public inspection in the Human Resources office at the above address during normal business hours.

I. **Call to Order**

II. **Approval of Minutes of May 2, 2019**

III. **Director's Report**

IV. **Public Comment**

Before addressing the Commission, please state your name and who you represent, if applicable. Comments will be limited to 3 minutes.

V. **Agenda Items**

VI. **Reports**

A. Park Ranger Assistant -Regional Parks Department-Specification Update

Recommendation: Approve the revisions to the Park Ranger Assistant class specification.

Amy Kraus, Human Resources Analyst III

B. Eligibility Worker III & Eligibility Supervisor I-Human Services Department-Position Review Study

Recommendation: Approve the update for the Senior Eligibility Specialist specification, the reclassification of the Eligibility Worker III and Eligibility Supervisor I positions in the Human Services Special Investigations Unit to Senior Eligibility Specialist and Eligibility Specialist Supervisor, respectively, with the retention of incumbents pursuant to Civil Service Rule 3.3B.

Maggie Miller, Principal Classification Analyst, Human Resources

C. Account Clerk II-Department of Health Services-Position Review Study

Recommendation: No change to the Account Clerk II position assigned to the Department of Health Services-Public Health Division, Environmental Health Section.

Tony Fortunato, Human Resources Analyst III

CIVIL SERVICE COMMISSION AGENDA

May 16, 2019

- VII. Other Scheduling Matters**
- VIII. Commissioners Closed Session**
- IX. Reconvene from Closed Session**
- X. Commissioners Open Session**
- XI. Appeals**
- XII. Adjourn**

The next Civil Service Commission meeting will be **Thursday, June 6, 2019** at 3:00 p.m., in the Sonoma County Board of Supervisors Chambers. The Agenda deadline for this meeting is 2:00 p.m., Monday, May 27, 2019.

DATE: May 16, 2019

TO: Civil Service Commission

SUBJECT: Updates to the Park Ranger Assistant Classification

On December 21, 2018, in a side-letter agreement, the County and Service Employees' International Union Local 1021 (SEIU) agreed to meet and confer during the term of the 2018-2019 Memorandum of Understanding to address extra-help issues and usage, including:

“HR, Regional Parks representatives, the CAO’s office, and SEIU will work cooperatively to establish a recommended baseline of permanent allocations, as supported by the data and financial resources to be recommended to the Board for approval as soon as feasible, but no later than June 30, 2019.”

As discussed at the April 18, 2019, Civil Service Commission meeting, HR, SEIU, and the other bargaining units agreed to revisions to the Civil Service Rules which included providing County service points to exam scores for applicants who previously worked in extra-help positions and adjusting the probationary periods for extra-help employees who are hired into permanent positions.

To address concerns raised in the side-letter agreement regarding baseline allocations, Regional Parks has submitted new position allocation requests to the CAO’s office for the Fiscal Year 2019-20, which includes six full-time Park Aide and six full-time Park Ranger Assistant allocations.

At this time, a revision to the Park Ranger Assistant class is necessary to allow Regional Parks to hire permanent allocations. Currently, the classification is limited to “extra-help employment.” Previously, at the December 21, 2017, Civil Service Commission, the Commission approved revisions to the Park Aide class specification which included updating and expanding the Park Aide classification to allow for “having regular positions allocated.” At that time, Park Aide was included as part of a larger study by Ralph Andersen & Associates, which reviewed nine positions in Regional Parks and updated the Park Aide and Park Program Assistant Classifications.

To create parity with the Park Aide classification, and due to the timing of the budget process, we have limited the scope of this revision to expanding the Park Ranger Assistant classification’s ability to hire regular, allocated positions as part of the County’s classification plan.

Therefore, HR recommends approving revisions to the Park Ranger Assistant class specification.

Amy Kraus
Human Resources Analyst

PARK RANGER ASSISTANT

Definition

Under supervision, performs responsible public contact and park protection work; collects visitor day-use and overnight camping fees; and performs related duties as required.

Distinguishing Characteristics

~~There are no permanent positions allocated to this job classification. Individuals hired into this class are extra help employees. Incumbents are employed during time periods where extra Park Ranger assistance is required.~~ Park Ranger Assistant is a journey level class with responsibility for performing park operation and maintenance tasks within the Regional Parks system.

Incumbents perform job duties in uniform and may be assigned work during weekends, holidays and irregular hours.

Typical Duties

Collects visitor day-use and overnight camping fees and issues warnings or courtesy envelopes while stationed in park entry booth, on foot or in a light motorized vehicle.

Assigns or directs visitors to facilities.

Visually inspects park facilities for cleanliness and empties trash containers and refills dispensers; sweeps, washes and disinfects restroom facilities.

Patrols parks on night shift or times when problems are likely to occur; fills out appropriate reports and forms.

Plants and waters trees, shrubs, flowers, and grass using hand and garden tools.

Performs routine and semi-skilled tasks in the construction, maintenance and repair of park structures and facilities such as buildings, picnic tables, barbeque pits, and informational signs.

Enforces park and natural resource rules and regulations governing park areas.

Performs routine clean up of facilities, including picnic and swimming areas, campgrounds, and boat launch facilities and cleaning barbeque pits and grills with hand tools.

Completes standardized daily fee collection reports; may make bank deposits.

May supervise Park Aides and/or maintenance assistants in routine park patrol and/or clean up work.

Knowledge and Abilities

Knowledge of: park practices and operations such as fee collection, park patrol, and park law enforcement; and ability to use hand tools, work aides, power tools and light machines; principles of supervision; basic first aid including cardiopulmonary resuscitation.

Ability to: follow oral and written instructions; apply first aid to park visitors; perform moderately heavy physical manual labor; detect safety hazards within a park area and report problems to supervisor; deal effectively and tactfully with the public and county personnel; tactfully enforce rules, regulations, laws and ordinances, safely drive and operate light motorized vehicles; work during weekdays, weekends, holidays, and irregular hours, and to wear a uniform.

Minimum Qualifications

Education: The ability to read and write English and make basic arithmetic calculations at a level for successful job performance is required.

Enrollment in a college or university with major course work emphasis in park management, natural resources, forestry, environmental studies or closely related field would be helpful.

Special Qualifications: Possession of a valid Basic First Aid card and a valid Cardiopulmonary Resuscitation and Emergency Cardiac Care card is desirable at time of employment and required after the first six months of employment.

Experience: Any experience that directly relates to the above knowledge and abilities. Normally, one season's experience as Park Aide would provide such an opportunity.

License: Possession of a valid driver's license at the appropriate level including special endorsements, as required by the State of California, may be required depending upon assignment to perform the essential job functions of the position.



REPORT TO THE CIVIL SERVICE COMMISSION

SPECIFICATION UPDATE

STUDY

Job Classification Studied:	Eligibility Worker III and Eligibility Supervisor I
Department/Division:	Human Services Department/Office of the Director’s Special Investigations Unit
Position Reports to (Classification):	Eligibility Worker III: Eligibility Supervisors Eligibility Supervisor I: Chief Fraud Investigator
Incumbent:	Eligibility Worker III: Araceli Manzo, Arcelia Calderon, Denisse Ledezma, Jennifer Pickrell, Michelle Pimentel, Rosemary Scott, Ryan Hughes, Sara Crosson, Sarah Payne, Silvia Acevedo Eligibility Supervisor I: Ana Rico, Dianna Banthrall
Bargaining Unit:	SEIU-05, SEIU-95
Study Requested by:	Incumbents

Recommendation:

Approve the update for the Senior Eligibility Specialist specification, the reclassification of the Eligibility Worker III and Eligibility Supervisor I positions allocated to the Human Services Department’s Office of the Director’s Special Investigations Unit to Senior Eligibility Specialist and Eligibility Specialist Supervisor, respectively, and retain the incumbents in accordance with Civil Service Rule 3.3B.

Class Study Requests:

Human Resources (HR) received position review requests from the Eligibility Worker III and Eligibility Supervisor I from incumbents in Fraud and Quality Assurance functional assignments for the Human Services Department’s (HSD’s) Office of the Director. The requests both indicated that the scope of duties and knowledge/experience required for these assignments exceed the bounds appropriate for their current classifications, primarily given their roles in reviewing and evaluating the economic assistance cases involving the Affordable Care Act (ACA).

Since the positions were originally assigned to two separate units, the study requests were submitted separately. However, in 2017 the functional assignments were combined into a single Special Investigations Unit with staff now responsible for supporting HSD’s fraud and quality assurance efforts. Therefore, the requests were combined and treated as a single, consolidated study.

Background

Human Services’ Public Assistance and Human Service Programs

Through its programs, HSD assists low-income, disabled, and unemployed individuals and their families with buying food (CalFresh), obtaining health care coverage (Medi-Cal, County Medical Services Program, and Covered California), and short-term help with rent, utilities, etc. (General Assistance, including Cash Aid). The work of managing these cases was originally performed by positions in the Eligibility Worker class series (Eligibility Worker I/II/III and Eligibility Supervisor). However, with the

expansion in programs and the implementation of the Affordable Care Act (ACA), the complexity, knowledge, and consequence of error associated with this body of work increased significantly. In response to these changes, the County established the Eligibility Specialist class series (i.e., Eligibility Specialist I/II, Senior Eligibility Specialist, and Eligibility Specialist Supervisor) and reclassified the Eligibility Worker positions in HSD's Economic Assistance Division to Eligibility Specialist positions.

At that time, CPS HR Consulting, a professional classification and compensation consultant, conducted comparator interviews for all Eligibility Worker positions at the County and determined that the work of the Eligibility Worker positions assigned to the Office of the Director had not been sufficiently changed to warrant reclassification, and the positions have remained in the Eligibility Worker III and Eligibility Supervisor classifications.

The Special Investigations Unit

This Unit is responsible for the review and assessment of economic assistance cases to detect, resolve, and prevent errors and overpayments; if appropriate, to prepare fraud for prosecution; and to identify areas that warrant corrective action and/or additional instruction/training of the Eligibility Specialist staff managing cases. These responsibilities include:

Fraud: Evaluating assistance claim files to identify and determine overpayments and prepare supporting documents for formal civil or criminal proceedings; assisting Welfare Fraud Investigators by providing evidence (e.g., reports) and making recommendations to support case referrals for Administrative Disqualification Hearings (ADH) and/or criminal/civil prosecution; reviewing and processing State and Federal Integrated Eligibility Verification Systems data to detect and prevent fraud; serving as technical resources related to handling fraud cases.

Quality Assurance: Identifying areas that warrant corrective action through targeted case reviews, including additional instructional support for front line staff; reviewing regulatory requirements affecting social service programs to develop customized cases management tools designed to support legal compliance; providing technical assistance to Eligibility Specialist staff.

The Studied Positions

The studied positions are all dedicated to performing or supervising the specialized work of the Special Investigations Unit as evidenced by the allocation of their time provided below.

Case Review (35% of Time): Determine and calculate overpayments through review, analysis, and interpretation of current and past program rules, regulations, and policies in effect throughout the history of the case; prepare related documentation detailing the findings; collect, prepare, and preserve evidence to be used in legal proceedings; appear as subject matter experts at ADH and court proceedings.

Welfare Fraud Investigation Support (30% of Time): Collaborate with Investigators in completing the case; research and prepare materials as potential evidence for legal proceedings; maintain investigative records; prepare reports, correspondence, and fraud case management recommendations; serve as subject matter experts in communicating with Investigators, District Attorneys, defense attorneys, Administrative Law Judicial staff, and HSD management.

Case and Referral Reviews (30%): Review and process, state and federal Income and Eligibility

Verification System reports to prevent and detect fraud; review referrals of overpayment calculations from Economic Assistance program staff; recommend acceptance and course of action on referrals, including ADH and/or legal prosecution.

Statistical Review & Analysis (5%): Collect and review case management statistics; identify trends in errors; prepare reports; make recommendations for training needs.

Through case reviews and investigations, HSD is able to identify areas for providing additional support to front-line Eligibility Specialists in Economic Assistance through training and the development of additional resources and guidelines.

Findings & Analysis:

In evaluating these positions HR reviewed and evaluated both the existing classes of Eligibility Worker III and Eligibility Supervisor and the newer classifications of Senior Eligibility Specialist and Eligibility Specialist Supervisor.

Eligibility Worker III/Eligibility Supervisor Classifications:

Eligibility Worker III: As defined, this classification is an advanced-journey level class working under direction in an eligibility determination unit in either a lead capacity or a specialized assignment requiring considerable inter-program knowledge of eligibility regulations, policies, and procedures.

Eligibility Supervisor: As defined, this classification has first line responsibility for the direction, planning, organization, and supervision of the initial and continuing eligibility for public assistance programs.

Senior Eligibility Specialist/Eligibility Specialist Supervisor Classifications:

Senior Eligibility Specialist: As defined, this is an advanced-journey level class working under general direction to determine eligibility for numerous assistance programs requiring advanced skill and may either serve as a lead worker or handle specialized assignment requiring considerable inter-program knowledge of eligibility regulations, policies, and procedures for a variety of assistance programs including Medi-Cal, private health insurance, and one or more assistance programs (e.g., CalFresh, County Medical Services Program, or General Assistance).

Eligibility Specialist Supervisor: As defined, this class works under general direction as first-line supervisors to plan, organize, and supervise eligibility determination and grant maintenance for the same span public assistance programs handled by the Eligibility Specialists working in Economic Assistance.

In reviewing the specifications for these classes, the differences between counterparts in these two series rest on the programs for which they perform eligibility work (both initial determinations and ongoing grant maintenance). It is important to note that through the 2016 study of the Economic Assistance positions, it became clear that this difference in number, type, and complexity of programs was key in altering the way in which eligibility determinations are managed. In fact, the consultant determined that the scope and complexity of work, level of required decision making, and the consequence of error associated with economic assistance eligibility determinations had all increased sufficiently to warrant the creation of the Eligibility Specialist series.

As state above, the studied Eligibility Worker III positions are responsible for reviewing, evaluating, and determining the appropriateness of the work performed by Eligibility Specialists in Economic

Assistance. They identify areas for new/additional training and ones that could benefit procedural enhancements, including the development or revision of guidelines that serve as case management reference materials. In addition to these quality assurance activities, these positions assist with preparing cases for civil and criminal prosecution; serving as expert witnesses on HSD processes. Accordingly, the work of these positions requires technical expertise in various assistance program requirements, legal mandates, case management techniques and requirements, and HSD protocols and procedures. These responsibilities exceed the level appropriate for the Eligibility Worker III classification, but are appropriately aligned with a specialized assignment for the Senior Eligibility Specialist class.

Similarly, the Eligibility Supervisor positions studied are responsible for the coordination, oversight, and direction of a work that is at least commensurate with that of their counterparts in Economic Assistance. Accordingly, the Eligibility Specialist Supervisor is a more appropriate match for these positions than their current class of Eligibility Supervisor.

Recommendation

Approve the update for the Senior Eligibility Specialist specification, the reclassification of the Eligibility Worker III and Eligibility Supervisor I positions allocated to the Human Services' Office of the Director's Special Investigations Unit to Senior Eligibility Specialist and Eligibility Specialist Supervisor, respectively, and retain the incumbents in accordance with Civil Service Rule 3.3B.

Report Prepared by:	Maggie Miller, Principal Classification Analyst
Report Approved by:	Spencer Keyword, Recruitment & Classification Manager
Date:	May 16, 2019

SENIOR ELIGIBILITY SPECIALIST

Definition

Under general direction, the Senior Eligibility Specialist performs duties requiring an advanced level of skill related to the determination of eligibility for Medi-Cal, private health insurance, and one or more additional public assistance and human service programs (e.g., CalFresh, County Medical Services Program, or General Assistance) within the Human Services Department; is the lead worker in the Eligibility Specialist series, and performs specialized duties or assignments which require considerable inter-program knowledge of eligibility regulations, policies, and procedures; and may relieve Eligibility Specialist Supervisors during periods of absence.

Distinguishing Characteristics

The Senior Eligibility Specialist is an advanced journey/lead-level classification in which incumbents are assigned lead responsibilities, specialized caseload duties, and/or complex assignments. Incumbents may assume increased levels of administrative responsibilities, assisting with supervisory duties as needed and serve as a resource to all staff in the Eligibility Specialist series due to their extensive and comprehensive knowledge of Medi-Cal, private health insurance, and one or more additional public assistance and human service programs.

This class is distinguished from the Eligibility Specialist I and II classes by the complexity, nature, and scope of assigned responsibilities; comprehensive program knowledge base; and high degree of independence exercised.

The Senior Eligibility Specialist differs from the Eligibility Worker III in that the former performs lead or specialized duties within the Human Services Department with primary responsibility for Medi-Cal, private health insurance, and one or more additional public assistance and human service programs.

Typical Duties

Duties may include but are not limited to the following:

Provides coaching, mentoring, and subject matter expertise while assisting with difficult and complex eligibility problems affecting the eligibility determination and grant maintenance process.

Functions as a technical resource for staff in relation to multiple public assistance programs including Medi-Cal, private health insurance, and one or more additional public assistance and human services programs.

Develops and updates training materials and job aids for the Eligibility Specialist series.

Provides, develops, and conducts training regarding new or changed program rules and regulations and related processes such as private health insurance and the overlapping of new programs with existing social services programs including Medi-Cal, and one or more additional

public assistance and human services programs, trainings include determining household composition based on tax filing, enrolling clients in a variety of medical programs through private health insurance, determining advanced premium tax credits for private health insurance, and explaining potential tax implications to clients.

Reviews cases for completeness, legibility, accuracy of computations, timeliness, presence of appropriate verification materials in files, and compliance with department quality assurance and quality control expectations and guidelines; assesses appropriateness of actions taken; determines corrections needed; explains to staff reasons behind corrections and the methods needed to resolve problems to ensure processing according to program timelines, compliance with program regulations and requirements, and to avoid the same problems in the future.

Troubleshoots highly difficult and complex cases that overlap multiple public assistance programs; problem solves cases that will not process or are processed incorrectly.

May delegate work, assign, and reassign caseloads and tasks deemed necessary to process eligibility information according to established timelines.

Determines eligibility and performs case management for the more complex or specialized cases requiring considerable inter-program knowledge of eligibility regulations, policies, and procedures.

May function as a liaison with department Help Desk to determine if system issues need to be submitted to a higher level for problem solving and resolution.

Interprets and explains state, federal, county, and departmental policies, rules, and regulations to staff, clients, and the public.

Makes program recommendations and participates in the development of internal office and unit policies and procedures.

Assists Eligibility Specialist Supervisors in executing specialized assignments and projects.

May lead lower level staff in special projects and assignments.

Provides data and observations to the supervisor for use in coaching, career development plans, performance reviews, and performance improvement plans.

Evaluates [public assistance](#) cases ([e.g., CalFresh, County Medical Services Program, General Assistance, including Cash Aid](#)) to identify potential fraudulent situations and make referrals to appropriate staff for investigatory procedures.

May perform additional research and gathering of information as requested.

May research and compile information and necessary documents for hearings as well as represent the department in dealings with the State Hearings Division concerning administrative hearings filed.

Uses considerable knowledge and skills to enter and correct information on a variety of automated public assistance systems.

Serves as a liaison and subject matter expert to other departmental program staff, community

organizations, boards, and committees as assigned.

Participates in the analysis and evaluation of statistical reports and of unit activities.

May implement supervisory directives and assume the responsibilities of the Eligibility Specialist Supervisor during periods of absence.

May perform all other duties commonly performed by an Eligibility Specialist II.

Performs related duties as assigned.

Knowledge and Abilities

Considerable knowledge of: laws, rules, and regulations governing eligibility and determination for diverse public assistance programs related to Medi-Cal, private health insurance plans, and other public assistance and human service programs and related case administrative processes and procedures; principle sources of information necessary to establish eligibility of applicants or recipients for various public assistance programs including Medi-Cal, private health insurance plans, and other public assistance and human service programs; methods and techniques of conducting an investigative interview; principles and practices of effective customer service.

Working knowledge of: principles and techniques of leadership, training, and staff development; general goals and specific regulations, policies, and procedures of public assistance programs; health insurance plans and medical health plan options and associated terminology; tax regulations, rules, terminology, forms, and household filing status; research and reporting methods, techniques, and procedures; principles of cultural and human behavior required to deal effectively with clients and staff; mediation techniques required to resolve competing or conflicting interests; the structure and content of the English language including the meaning and spelling of words, rules of composition, punctuation, and grammar; modern equipment and communication tools used for business functions and program, project, and task coordination; computers and software programs (e.g. Microsoft software packages) to conduct research, assess information, and/or prepare documentation; techniques for developing effective working relationships with the public, other governmental agencies, and other personnel.

Knowledge of: supervisory techniques and practices, training program design, materials development, and presentation; economic and social problems that call for the use of public assistance programs.

Ability to: lead and direct the work of others; perform complex, responsible, and difficult technical administrative work involving the use of independent judgment and personal initiative; plan, organize, and coordinate the work of technical and administrative support personnel; interpret and explain complex rules, regulations, and revisions affecting the eligibility determination and case management processes; conduct training for a variety of social service programs utilizing clear and concise materials and terms understandable to the targeted audience; determine eligibility and grant maintenance for the more difficult and complex cases; evaluate information and determine appropriate action in conjunction with learned rules and regulations; explain complex rules, regulations, and health insurance plan options and details in clear language to ensure clients' understanding; review a variety of tax

documents to obtain needed household filing information; explain Advanced Premium Tax Credit implications to clients; conduct and control an investigatory interview effectively in a variety of settings; detect and evaluate potential fraudulent situations; determine appropriate course of action in emergencies; accurately complete complex mathematical computations; refer clients to other appropriate services as needed; assess and manage difficult and hostile persons or situations; know when to and call for intervention when appropriate; work in a fast-paced, professional office environment and prioritize a wide range of duties with varying time requirements to ensure timely completion; keep supervisor informed of progress, problems, work efforts, and results and make effective use of supervision; establish and maintain effective working relationships with those contacted in the course of business (e.g., staff, the public, and other agencies); speak, read, and write English at a level sufficient to communicate clearly and concisely and explain complex regulations and policies in plain language, both orally and in writing, using appropriate English grammar and syntax with persons from a variety of socio-economic, cultural, and educational backgrounds; effectively use computer systems, applications, and modern business equipment to perform a variety of work tasks.

Minimum Qualifications

Education and Experience: Any combination of education, training, and experience which would likely provide the required knowledge and abilities. Normally, this would include:

One year of full-time experience performing duties equivalent to an Eligibility Specialist II.

OR

Three years of full-time experience performing duties equivalent to an Eligibility Worker II including experience assessing eligibility for Medi-Cal and/or private health insurance. Experience assessing eligibility for both Medi-Cal and private health insurance is highly desirable.

License: Possession of a valid driver's license at the appropriate level including special endorsements, as required by the State of California, may be required depending upon assignment to perform the essential job functions of the position.

Special Skill Requirement: Designated positions may require the ability to speak, read, and write a language in addition to English.



REPORT TO THE CIVIL SERVICE COMMISSION POSITION REVIEW STUDY

Job Classification Studied:	Account Clerk II
Department/Division:	Department of Health Services – Public Health
Position Reports to (Classification):	Department Analyst
Incumbent:	Ann Johnson
Bargaining Unit:	SEIU-01
Study Requested by:	Incumbent

Recommendation:

No change to the Account Clerk II position assigned to the Department of Health Services – Public Health Division, Environmental Health Section.

Justification Submitted in the Request:

Human Resources received a request from the incumbent to study the Account Clerk II position that provides clerical accounting support for the Environmental Health Section in the Public Health Division of the Department of Health Services. According to the submission, the position’s duties include food service business permit invoicing, accounts receivable, fees and penalties, penalty adjustments, business closures, and permit revocation. The study request asserts that some of these duties represent a higher level of work and require increased customer contact and independent judgment (e.g., waiving penalties) that exceed the scope appropriate for the current classification.

Background:

The Environmental Health Section of the Public Health Division is responsible for promoting the health and safety of the public through education, surveillance, routine inspections, sampling, posting, and enforcement where necessary. Program services include food safety (e.g., restaurant monitoring), pool and spa safety, water quality, and cannabis permits.

In 2017, after the October wildfires, the Environmental Health Section was tasked with intake and processing of Right of Entry (ROE) applications for debris removal. At that time the Unit’s Senior Account Clerk was reassigned to the Right of Entry fire recovery program, and the studied position’s responsibilities were expanded to include the food service permit process administration, with its associated customer service duties, that were previously performed by the Senior Account Clerk.

Findings

Based on a review of the incumbent’s Class Study Request, PDQ, and informational interview meeting, HR found that the studied position performs clerical accounting support duties and responsibilities which include:

- Processing of accounts receivable and invoice payments; including collection of mail, checks, invoices; entering of checks into register; batching in Envision connect; and sorting and

distributing paid invoices. The position spends approximately 40% of time on these tasks

- Performing daily closing of the register; including counting cash and checks; balancing against the register; running reports; and preparing the deposit bag. The position spends approximately 15% of time on these tasks.
- Answering phones and general questions at front counter for all programs, taking complaints, sorting mail, and directing customers as needed. The position spends approximately 15% of time on these tasks.
- Creating overdue account letters, preparing certified copies, and entering overdue status into Envision Connect and financial spreadsheets. The position spends approximately 10% of time on these tasks.
- Ordering materials for office and field inspectors; this involves networking with vendors and accounts payable to process orders, obtaining approval from Program Manager, filing paperwork, and checking in materials once received. The position spends approximately 10% of time on these tasks.
- Coding invoices for accounts payable, obtaining Program Manager's signature as needed, tracking expenditures for fire recovery work. The position spends approximately 5% of time on these tasks.
- Answering questions from staff and the public related to accounting by phone and in person, including the processing of phone payments and refunds. The position spends approximately 5% of time on these tasks.

In the initial study request, the incumbent listed that she performed monthly invoicing for all programs, including adding penalties and writing off delinquent accounts. Through the PDQ and desk audit interview, HR learned that these duties had been reassigned at the incumbents request and are no longer being performed.

Analysis:

Based on the position's range of duties, HR determined that the comparator classifications most appropriate to review include the incumbent's current class of Account Clerk II and Senior Account Clerk.

Account Clerk II

The Account Clerk II is characterized as the journey-level class in the Account Clerk series, and as such is responsible for a segment of work within the scope of a larger bookkeeping program or record keeping system. Incumbents are required to have an understanding of the system to which assigned, coordinate work with others, and answer a variety of questions related to department accounts and services. Positions in the class of Account Clerk II are responsible for reviewing and making adjustments to transactions and accounts in compliance with established regulations, procedures, and record keeping practices. Typical duties for this classification include:

- Maintains cost records; reconciles balances with control records; posts cash receipts to accounts receivable ledgers; balances and reconciles accounts; posts and balances accounts payable; prepares summaries; prepares annual cost statistics
- Receives financial documents; screens documents for accuracy and adherence to procedural

requirements; carries out procedural steps to insure or authorize payment; posts data to records; checks and balances totals

- Makes routine contacts with other County departments, other agencies, and members of the general public to discuss financial records and transactions; provides information on records maintained; may prepare routine correspondence; prepares periodic and financial statistical reports
- Assists in the preparation and batching of financial and statistical information for data processing; assists in the review and balancing of input documents; participates in the monitoring and reconciliation of data processing printouts; may make adjustments and corrections as necessary.
- Assists the public in person or by phone by answering inquiries related to department records and services; answers inquiries related to the status of accounts; explains commonly used regulations and procedures; explains the proper use of forms and documents; screens incoming mail, visitors, and calls

Senior Account Clerk

The Senior Account Clerk is the advanced working level in the Account Clerk series, and as such exercises detailed subject matter knowledge of a specific bookkeeping program area or a specialized statistical or record keeping system. Incumbents in this class may serve as lead workers and work with independent judgment and discretion to make decisions which have the effect of finality. Typical Duties for this classification include:

- Maintains complex financial records and checks financial transactions; assists in the development of procedures and methods; prepares financial and statistical statements and reports
- Makes computations applying varied formulas and percentage tables, and exercises independent judgment in applying general guidelines; arranges for payments in accordance with legal provisions
- Prepares financial reports independently; checks and balances reports and records of other departmental offices; provides information on records maintained and procedures followed in compliance with legal and administrative requirements
- May provide lead direction and/or train employees engaged in financial record keeping activities; assists in the evaluation of their performance; may participate in the selection of new employees
- Answers inquiries related to department records, accounts, and programs; works with the public in receiving complaints and attempting to resolve them; explains rules, policies, and procedures; explains the proper use and completion of forms and documents

Discussion

As indicated above, the Senior Account Clerk classification is an advanced-journey level class that exists to serve as a subject matter expert in a specialized area and to act as a lead worker. Senior Account Clerks handle complex financial records and transactions with independence, and make decisions which have the effect of finality. Further, positions in this class frequently assist in the development of

procedures and methods within their assigned area.

Comparatively, positions in the Account Clerk II classification are responsible for a segment of work within the scope of a larger bookkeeping program or record keeping system that requires an understanding of the assigned system sufficient for performing day-to-day work. Incumbents coordinate work with others and answer a variety of questions related to department accounts and services.

The position spends approximately 70% of its time processing accounts receivable and invoice payments (including related duties such as collecting the mail, entering and batching checks), closing register each day, and answering general program questions at front counter and on the phone. While the position creates overdue account letters and refers accounts to collections, these tasks are completed with multiple levels of review and approval, and the Director must sign off on any accounts sent to collections. Therefore, these duties are all covered by established procedures, and do not require decision making with the effect of finality, and fall within the scope of the Account Clerk II classification.

Conclusion

Human Resources found the duties being required of the studied position to be consistent with the journey-level Account Clerk II classification. Therefore, HR has determined that the Account Clerk II classification is the most appropriate match for the studied position.

Recommendation

No change to the Account Clerk II position assigned to the Environmental Health Section of the Public Health Division of the Department of Health Services

Report Prepared by:	Tony Fortunato, Human Resources Analyst
----------------------------	---

Report Approved by:	Spencer Keyword, Recruitment & Classification Manager
----------------------------	---

Date:	
--------------	--

CIVIL SERVICE COMMISSION MINUTES
Sonoma County Human Resources Department
May 2, 2019

PRESENT

Commissioners: Mark Walsh, Jon Hadzess, Tricia Gwillim

Human Resources Staff: Christina Cramer, Amy Kraus, Maggie Miller, Colleen Goetz, Spencer Keywood, Stefanie Stornetta, Tony Fortunato, Rosie Rocha, Jennifer Lelouarn, Adriana Call, Marissa Georges

Commission Counsel: Not Present

I. CALL TO ORDER

The meeting was called to order at 3:00 p.m.

II. APPROVAL OF MINUTES

Motion: Commissioner Hadzess

Second: Commissioner Gwillim

Ayes: 3 **Absent:** 2

III. DIRECTOR'S REPORT

Christina Cramer, Human Resources Director announced that the Human Resources Department had two Human Resources Technician positions added to the Recruitment and Classification unit. The HR technicians are charged with maintaining and updating position related information in the HR data system, facilitating updates to the County's position allocation list, and ensuring County payroll compliance with multiple MOU's and the Civil Service Rules.

IV. PUBLIC COMMENT

None

V. Agenda Items

A. Oath of Office

Darin Bartow, Clerk of the Board of Supervisors, administered the Oath of Office for Commissioner Hadzess.

VI. Reports

A. Assessment Process Specialist Class Study

Maggie Miller, Principal Classification Analyst, reported on approving a new classification of Assessment Specialist and to abolishing the existing classification of Assessment Process Specialist and approving the reclassification of current Assessment Process Specialists, with the retention of incumbents provided in Civil Service Rule 3.3B.

Motion to approve: Commissioner Hadzess
Second: Commissioner Gwillim
Questions:
Ayes: 3 Absent: 2

VII. APPEALS

VIII. COMMISSIONERS CLOSED SESSION

IX. COMMISSIONERS OPEN SESSION

Commissioner Walsh thanked Commissioner Hadzess for his almost thirty years of serving the public.

X. OTHER SCHEDULING MATTERS

XI. ADJOURN

The Civil Service Commission meeting was adjourned at 3:10 p.m.