Placer County is committed to ensuring that persons with disabilities are provided the resources to participate fully in its public meetings. If you are hearing impaired, we have listening devices available. If you require additional disability-related modifications or accommodations, including auxiliary aids or services, please contact the Commission Clerk. If requested, the agenda shall be provided in appropriate alternative formats to persons with disabilities. All requests must be in writing and must be received by the Commission Clerk five business days prior to the scheduled meeting for which you are requesting accommodation. Requests received after such time will be accommodated only if time permits.

Public Participation Procedures

In order to protect public health and the safety of our Placer County citizens, attendance for the Civil Service Commission will be offered as a completely virtual Zoom meeting webinar. The Human Resources Department will be closed to public attendance.

Join from a PC, Mac, iPad, iPhone, or Android

https://zoom.us/j/93275655596

Join by Telephone

Dial: 669-900-6833 OR 877-853-5247 (Toll Free)

Webinar ID: 932 7565 5596

In compliance with Governor Newsom’s Executive Order N-29-20-EO on telephone meetings, the public’s participation will be supported through web or phone participation for attendees. When Public Comment is opened, participants may “raise hand” to be called upon to give their public comment.

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OPEN SESSION
Call to Order | 3:30PM
Roll Call | Judy McKeig

Public Comment:
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1. Approval of Agenda | Regular Meeting, July 13, 2020

2. Approval of Minutes | Regular Meeting, June 8, 2020

3. Classification Specification Revision | Executive Assistant
   Presenter: Lindsay Killian, Human Resources Analyst II
   Approve the proposed revisions to the classification specification for Executive Assistant.

4. Classification Specification Revision | Claims Specialist Series
   Presenter: Valeria Bachinsky, Human Resources Analyst II
   Approve the proposed revisions to the classification specifications for Claims Specialist I/II and Senior Claims Specialist.

5. Request for Reclassification | Information Technology Department
   Presenter: Valeria Bachinsky II, Human Resources Analyst II
   Approve:
   a. The reclassification of one Information Technology Technician II position, GNRL Grade 100, to the classification of Information Technology Analyst I, PROF Grade 230; and
   b. The non-competitive promotion of the incumbent pursuant to County Code section 3.08.480.

6. Retroactive Non-Competitive Promotion | Health & Human Services-Human Services Division
   Presenter: Erica Priddle, Human Resources Analyst I
   Determine whether a retroactive non-competitive promotion be granted for employee number 51235196 in the Department of Health and Human Services - Human Services Division from the classification of Eligibility Specialist - I, Grade 55 to Eligibility Specialist - II, Grade 67, effective May 9, 2020.

7. Classification and Compensation Study | Account Clerk | Countywide
   Presenter: Suzanne Holloway, Human Resources Manager
   Approve:
   a. The proposed revisions to the classification specifications for Account Clerk Entry, Account Clerk Journey, Senior Account Clerk and Accounting Technician;
   b. The creation of a new classification of Payroll Technician, with the recommended salary grade of GNRL 73;
   c. The reclassification of four Accounting Technician positions in the Auditor-Controller’s Office to the new classification of Payroll Technician, as well as the administrative placement of the current position incumbents;
d. The reclassification of one Account Clerk Journey position in the Sheriff’s Office to Senior Account Clerk, as well as the administrative placement of the current position incumbent;
e. The reclassification of one Account Clerk Journey position in the Department of Information Technology to Accounting Technician, as well as the administrative placement of the current position incumbent; and
f. The reclassification of one Senior Account Clerk position in the Department of Agricultural Commissioner & Farm Advisor to Accounting Technician, as well as the administrative placement of the current position incumbent.

8. Communications
Reports to the Commission are informational only. No action will be taken.

a. Provisional Appointments: 20
   i. Health & Human Services - Administration: 2
   ii. Health & Human Services - Public Health: 18
b. Staff Reports and Correspondence: Kate Sampson
c. Commissioner Comments

9. Classified Employees Merit Increases
Approve merit increases for classified employees pursuant to Placer County Code Section 3.04.650 (progression in steps).

10. Adjournment to the following upcoming meetings

   Regular Meeting Calendar 2020
   Second Monday of the Month - 3:30PM
   Human Resources Department, 1st Floor Conference Room
   145 Fulweiler Avenue, Suite 200, Auburn, CA 95603
   OR
   Zoom Virtual Meeting with public participation instructions on agenda
   Monday, August 10, 2020
   Monday, September 14, 2020
   Monday, October 12, 2020 - Tuesday, October 13, 2020
   Monday, November 9, 2020
   Monday, December 14, 2020
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OPEN SESSION

Call to Order | 3:31PM
Roll Call | Judy McKeig
Present | Ward, Bennett, Costa, Hull, Le Doux

Administration of the Oath of Office of Commissioner Harry Hull | William Wright
Commissioner Ward expressed thanks to Commissioner Randolph on behalf of the Commission for performing his duties with dedication and service to the employees of Placer County.

Public Comment: None
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1. Approval of Agenda | Regular Meeting, June 8, 2020
Motion:   Le Doux/Bennett/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux
No public comment

2. Approval of Minutes | Regular Meeting, May 11, 2020
Motion:   Le Doux/Bennett/Majority vote 4:0
Ayes: Ward, Bennett, Costa, Le Doux
Abstain: Hull
No public comment

3. Re-election of Officers for 2020
Presenter: Kate Sampson, Human Resources Director
The Human Resources Department recommends the Civil Service Commission re-elect its officers for calendar year 2020.
Commissioner Le Doux moved election of Commissioner Ward as Chair.
Motion:   Le Doux/Costa/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux
Commissioner Costa moved election of Commissioner Bennett as Vice Chair.
Motion:   Costa/Le Doux/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux
No public comment

4. Work Out-of-Class Pay | Child Support Services
Presenter: Heidi Kemytsky, Senior Human Resources Analyst
Attendee: Laura Van Buskirk, Director; Jeff Thompson, Administrative & Fiscal Officer II
Approve a work out-of-class pay extension as per Placer County Code 3.08.510 (C)(5)(c) for employee 51235226 for approximately 180 days in the Child Support Services Department.
Motion:   Hull/Le Doux/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux

Ms. Kemytsky introduced Laura Van Buskirk, Director of Child Support Services. The department requests an additional 180-day extension for an employee tasked with training five new employees to meet state and federal requirements. The six-month training session
was to be completed by June 2020 but was put on hold due to COVID-19 in March; it is
anticipated to resume shortly. No public comment. No Commission comment.

5. Work Out-of-Class Pay | Health and Human Services Department, Human Services Division
Presenter: Courtney Thomas, Human Resources Analyst II
Attendee: Greg Geisler, Assistant Program Director
Approve a work out-of-class pay extension as per Placer County Code 3.08.510 (C)(5)(c) for
employee 51233214 and employee 51234002 for approximately 180 days in the Health and
Human Services Department, Human Services Division.
Motion: Le Doux/Costa/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux

The department requests a 180-day extension for an Eligibility Specialist Senior working as an
Eligibility Supervisor in the Medi-Cal unit during the incumbent’s extended leave of absence.
The second request is to fill behind the resulting Eligibility Specialist Senior vacancy with an
Eligibility Specialist II. The assignments are expected to end when the Eligibility Supervisor
returns from their leave of absence. No public comment. No Commission comment.

6. Work Out-of-Class Pay | Human Resources Department
Presenter: Lindsay Killian, Human Resources Analyst II
Attendee: Michelle Beauchamp, Assistant Director
Approve a work out-of-class pay extension as per Placer County Code 3.08.510 (C)(5)(c) for
employee 51231985 for approximately 180 days in the Human Resources Department.
Motion: Le Doux/Bennett/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux

The department requests an additional extension for an Administrative Technician as an
Information Technology Specialist to support the Workday Support Organization. The
assignment began in December 2017 with the implementation of Workday, the county’s new
financial, payroll, and human resources system. Phase 1 for financials went live in July 2018
and phase 2 for human resources and payroll went live in June 2019. The position requires a
dedicated staff member to continue to provide post-implementation support and work
through enhancement lists.

No public comment. The Commission questioned the length of the assignment, pay
differential, and potential position reclassification. Ms. Beauchamp noted the several staff
members moved to the Workday Support Organization prior to go live and this employee
currently spends 50% of their time providing support off-site. The department does not
anticipate the assignment lasting longer than six months and is evaluating the workload and
staff impacts if the position is reclassified. The work out-of-class assignment allows the
department to appropriately compensate the employee for performing higher level duties.

7. Retroactive Work Out-of-Class Pay | Community Development Resource Agency
Presenter: Laura Carucci, Human Resources Analyst II
Attendee: Tim Wegner, Deputy Director of Building Services
Determine whether retroactive work out-of-class pay be granted for one Building Inspector II
in the Community Development Resource Agency beginning March 28, 2020 and ending
April 24, 2020.
Motion: Le Doux/Bennett/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux
The department is requesting retroactive work out-of-class pay for a Building Inspector II who began working out-of-class on March 28, 2020. Due to an administrative error the department did not submit the request to Human Resources for processing in a timely manner.

No public comment. The Commission observed vacancies in the department’s organizational chart and questioned how the delay occurred. Mr. Wegner noted staff were moving to telecommuting during this time with shifting priorities and a key staff member retired leading to a delay in processing the paperwork.

8. Classification Specification Revision | Capital improvements Manager | Department of Facilities Management
Presenter: Laura Carucci, Human Resources Analyst II
Attendee: Laurie Morse, Deputy Director
Approve the proposed revisions to the classification specification of Capital Improvements Manager.
Motion: Hull/Bennett/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux

The Human Resources Department (HRD) maintains all classification specifications and the countywide classification plan and reviews as needed or every five years. The Capital Improvements Manager is a single position classification and HRD received a request from the department to review in anticipation of filling the position. The recommended updates include the department name, job duties, and removing old language pertaining to experience. The minimum qualifications still require two years of supervisory experience.

No public comment. The Commission questioned if HRD reviews each classification every five years and if the one-year probation period was typical. Ms. Carucci noted it is HRD’s goal to review all classifications every five years. A one-year probationary period is standard and has not changed for this position although there are several classifications with probationary periods of 18 months. As HRD updates classification specifications countywide, language related to the probationary period, working conditions, and bargaining unit is being added for clarity.

9. Classification and Compensation Study | Administrative Legal Clerk | Countywide
Presenter: Kathy Youngs, Senior Human Resources Analyst
Attendee: Shellie Anderson, Bryce Consulting
Approve:
   a. The proposed revisions to the classification specifications for Administrative Legal Supervisor, Senior Administrative Legal Clerk, and Administrative Legal Clerk Entry/Journey;
   b. The reclassification of four Administrative Legal Clerk Journey positions to the classification of Senior Administrative Legal Clerk and the administrative placement of the incumbents; and
   c. The reclassification of two Administrative Legal Clerk Journey positions (one filled/one vacant) to the classification of Administrative Clerk Journey.
Motion: Le Doux/Bennett/Unanimous vote 5:0
Ayes: Ward, Bennett, Costa, Hull, Le Doux
Ms. Youngs presented the results of the countywide classification study for the Administrative Legal Clerk series. The study was conducted in compliance with the current Memorandum of Understanding with the Placer Public Employees Organization (PPEO) and at the request of the Sheriff’s Office. HRD contracted with Bryce Consulting to conduct the study.

The study encompassed 89 positions across four departments: Sheriff’s Office, Probation, District Attorney, and Health & Human Services. Overall, the classification is being utilized appropriately, however language and terminology updates are recommended. In addition, four Administrative Legal Clerk Journey positions in the Sheriff’s Office, Corrections Division Court Liaison Unit are recommended to be reclassified to Senior Legal Administrative Clerk with the incumbents administratively placed due to the higher-level complexity of the duties performed. Two Administrative Legal Clerk Journey positions in the Sheriff’s Office, Commissary Unit are recommended to be reclassified to Administrative Clerk Journey positions. A request for an appeal was received by an incumbent but was ultimately withdrawn. The second position in this unit is vacant. The consultant also conducted a compensation study and no changes are recommended.

No public comment. The Commission confirmed the Administrative Legal Clerk Journey incumbent will be Y rated in their new position, and their salary will remain at the current range and step until the new classification catches up. The Commission discussed the differences in duties for an Administrative Legal Clerk, Account Clerk, and Administrative Clerk, and the length of time since the series was last studied.

10. Communications

Reports to the Commission are informational only. No action will be taken.

a. Provisional Appointments: One Coroner Technician in the Sheriff’s Office

b. Staff Reports and Correspondence: Kate Sampson

i. Heidi Kemytsky introduced Karen Barocio, Human Resources Analyst II. Ms. Barocio has a Bachelor of Arts in Ethnic Studies and a Master’s in Human Resource Administration. Ms. Barocio has private and public sector experience and has worked as a Human Resources consultant at CPSHR.

ii. Suzanne Holloway introduced Erica Priddle, Human Resources Analyst I. Ms. Priddle has a Bachelor of Arts in Family Services and has been employed as an Administrative Technician in HRD for the past four years. Ms. Priddle has provided support to various departments in this role and supported Employee Wellness.

iii. Ms. Sampson provided an update on the Charter Review Committee’s recommendations going to the Board of Supervisors (BOS) at their June 9, 2020 meeting. Civil Service Commission amendments are one of five recommendations for their consideration, the details of which are available on the county’s website. BOS meetings are held via Zoom with public comment submitted in advance through email as well as during the meeting.

iv. Ms. Sampson expressed appreciation to the Commission for its patience hosting virtual meetings and noted the county will begin phasing in normal operations pending State and Public Health Officer directives. Details for the Commission’s July meeting will be forthcoming.

v. Ms. Sampson noted the BOS will consider the proposed Fiscal Year (FY) 20-21 budget at the June 9 meeting. There are no cost saving recommendations such as furloughs or layoffs that would affect employees. The County Executive Office will monitor impacts over time.
c. Commissioner Comments
   i. Costa stated it was an honor and pleasure to work with Commissioner Randolph who served as president for several years, noting his professional leadership guided the Commission through major changes and will be missed.
   ii. Le Doux has served on the Commission for 37 years and noted Commissioner Randolph was one of the best he has worked with. Le Doux offered a welcome to Hull.

11. Classified Employees Merit Increases
    Approve merit increases for classified employees pursuant to Placer County Code Section 3.04.650 (progression in steps).
    Motion: Le Doux/Bennett/Unanimous vote 5:0
    Ayes: Ward, Bennett, Costa, Hull, Le Doux

   No public comment. The Commission discussed the merit approval process which includes agreement by the employees’ supervisors and management and inquired about budget allocation for increases. HRD reviews all evaluations to ensure the employee is performing at a satisfactory level.

12. Adjournment to the following upcoming meetings 4:42PM
    Motion: Costa/Le Doux/Unanimous vote 5:0
    Ayes: Ward, Bennett, Costa, Hull, Le Doux

    Regular Meeting Calendar 2020
    Second Monday of the Month - 3:30PM
    Human Resources Department, 1st Floor Conference Room
    145 Fulweiler Avenue, Suite 200, Auburn, CA 95603
    OR
    Zoom Virtual Meeting with public participation instructions on agenda

    Monday, July 13, 2020
    Monday, August 10, 2020
    Monday, September 14, 2020
    Monday, October 12, 2020 - Tuesday, October 13, 2020
    Monday, November 9, 2020
    Monday, December 14, 2020

_________________________________   __________________________________
Rick Ward, Chair       Judy McKeig, Commission Clerk
DATE: July 13, 2020
TO: Civil Service Commission
FROM: Kate Sampson, Director of Human Resources
BY: Lindsay Killian, Human Resources Analyst
SUBJECT: Request for Classification Specification Revisions – Executive Assistant

Recommendation
The Human Resources Department recommends that the Civil Service Commission approve the proposed revisions to the classification specification for Executive Assistant.

Basis for Recommendation
Due to a recent decision to restructure some of the reporting relationships within the County Executive Office, updates to the classification specification for Executive Assistant are necessary to more accurately define the supervisory role of this classification, as well as to add sections for Working Conditions, Probationary Period, and Bargaining Unit to align with the new specification formatting approved at the February 2019 Civil Service Commission meeting.

The current specification describes that this position may exercise technical and functional supervision over clerical and secretarial staff. With new reporting relationships in place, it is recommended that the language be updated to reflect that this position will be exercising direct supervision over clerical, secretarial, and administrative support staff, as the Executive Assistant will be directly supervising Executive Secretaries and other administrative support staff. The differences between the two types of supervision exercised by employees as defined in the County Classification Plan are summarized below:
<table>
<thead>
<tr>
<th><strong>Direct Supervision</strong></th>
<th><strong>Technical &amp; Functional Supervision</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsible for the assignment of job duties and tasks, scheduling, and time off approval.</td>
<td>Responsible for prescribing procedures, methods, materials, and formats for the completion of tasks as the technical expert in a specific field.</td>
</tr>
<tr>
<td>Reviews and evaluates employee performance/completes annual performance evaluations; identifies and monitors employee development goals.</td>
<td>May provide direction as to the how and why a duty is performed; schedules and assigns tasks as they relate to the completion of an assigned project or work product.</td>
</tr>
<tr>
<td>Includes authority to select, terminate, and manage staff performance (e.g., corrective action/discipline).</td>
<td>Includes authority for the work completed by employees not under direct supervision.</td>
</tr>
<tr>
<td>Responsible for the worker as well as the work</td>
<td>Responsible for the work but not the worker</td>
</tr>
</tbody>
</table>

New sections for Working Conditions, Probationary Period, and Bargaining Unit were also added to align with the updated classification specification format approved by your Commission at the February 2019 CSC meeting.

Pursuant to County Code section 3.08.520, the employees impacted by the classification specification changes have been notified of this recommendation and the action to move the request forward to the Civil Service Commission at today’s meeting.

Attached for your review and consideration is a copy of the classification specification for Executive Assistant with the proposed updates noted, along with an organizational chart for the County Executive Office.

**Attachments**

1. Classification specification for Executive Assistant
2. Organizational chart for the County Executive Office
EXECUTIVE ASSISTANT TO COUNTY EXECUTIVE OFFICER

DEFINITION
To perform complex, confidential, and specialized professional administrative functions for a variety of programs and projects for the County Executive Officer and associated staff; coordinates meetings, schedules, and required reference materials; supervises assigned clerical, secretarial, and administrative support staff; and performs related work as assigned.

DISTINGUISHING CHARACTERISTICS
This is an administrative position serving in a staff capacity as Executive Assistant to the County Executive Officer. Work is performed under the general direction of the County Executive with discretionary latitude given for the exercise of independent judgment in performing assigned responsibilities. This class is distinguished from other office support and secretarial classes as the scope of responsibilities requires the incumbent to possess extensive knowledge of unique, diverse, and complex issues and daily events of a highly sensitive nature. The frequent use of discretion, initiative, diplomacy, and independent judgment is critical and consequential to the impact and operation of County business.

SUPERVISION RECEIVED AND EXERCISED
Receives direction from the County Executive Officer.
May exercise technical and functional supervision over assigned clerical, and secretarial, and administrative support staff.

EXAMPLES OF ESSENTIAL DUTIES – Essential duties may include, but are not limited to, the following:
- Sets priorities and meets critical deadlines; organizes work effectively in accordance with and in anticipation of the needs of the County Executive Officer.
- Transmits information on behalf of the County Executive Officer and coordinates departmental activities with other County departments; monitors the progress and execution of projects and activities initiated by County Executive Office.
- Performs complex and highly responsible verbal and written secretarial and administrative duties for the County Executive Officer.
- Receives and screens visitors and telephone calls of a highly confidential and sensitive nature; provides information which requires the use of independent judgment and interpretation of policies and procedures; responds to complaints and requests for information or refers to departmental staff as appropriate.
- Independently initiates and composes reports on behalf of the County Executive Officer.
- Researches, compiles, and summarizes a variety of informational or statistical materials; may compile and review budget figures and process purchase...
requisitions; maintains budget, purchasing, and other financial and business records.

- Prior to review and authorization by the County Executive Officer, reviews all finished materials for completeness, accuracy, format, compliance with policies and procedures, appropriate English usage, and returns to appropriate department for corrections.

- Maintains the County Executive Officer’s calendar, schedules meetings, appointments, and speaking engagements using discretion with time commitments; notifies participants, coordinates timeframes, and meeting locations, and prepares required informational materials.

- Manages all administrative tasks for the County Executive Officer related to travel arrangements.

- Advises the County Executive Officer on matters of a sensitive nature that may affect County operations and interpersonal relationships.

- Represents the County to the public, businesses, Board members, and other agencies at the request of the County Executive Officer.

- Provides directions and conveys complex, sensitive information on behalf of the County Executive Officer to members of the Board of Supervisors, department directors, CEO staff, and others.

- Coordinates office activities and schedules; develops and recommends office procedures and systems; ensures smooth office operations and adherence to all deadlines.

- Plans, prioritizes, assigns, supervises, and reviews the work of clerical, secretarial, and administrative support staff; participates in the selection of staff; provides or coordinates staff training; conducts performance evaluations; recommends discipline; implements discipline procedures as directed.

- Reviews and summarizes miscellaneous reports and documents; prepares background documents as necessary.

- Researches and analyzes routine administrative projects for the County Executive Officer and Board of Supervisors; prepares first draft reports on routine administrative matters.

- Receives and distributes incoming mail; reviews and evaluates mail to identify those items requiring priority attention of the County Executive Officer.

- Provides follow-up to assignments given management staff by the County Executive Officer; provides status reports to the County Executive Officer.

- Receives telephone calls including complaints, and provides assistance to callers using judgment as to calls requiring priority attention.

- Independently responds to letters and general correspondence of a routine nature.

- Builds and maintains positive working relationships with co-workers, other County employees, and the public using principles of good customer service.

- Performs related duties as assigned.
WORKING CONDITIONS

Work is typically performed in an indoor office environment with controlled temperature conditions. Position may require travel to and from other locations in a variety of outdoor weather conditions.

MINIMUM QUALIFICATIONS

Knowledge of:

- Principles and practices of routine analytical research.
- Principles of supervision, training, and performance evaluations.
- Principles and practices of motivation, team building, and conflict resolution.
- Organization, procedures, and operating details of a county executive's office.
- County emergency operations and procedures.
- Techniques required to handle complaints and provide excellent public service.
- English usage, spelling, grammar, and punctuation.
- Modern office methods, procedures, and computer equipment.
- Computer software, including word processing, database, spreadsheet, and other related applications.
- County governmental structure and operations and pertinent County functions, policies, rules, and regulations.
- Principles and methods of business letter and report writing.
- Advanced secretarial/executive assistant techniques.

Ability to:

- On a continuous basis, sit at desk for long periods of time. Intermittently twist and reach office equipment; write or use keyboard to communicate through written means; occasionally run errands; may lift light weight.
- Intermittently review documents related to department operations; observe, identify, and problem solve office issues and procedures; understand, interpret, and explain department and county policies and procedures; explain and problem solve office issues for the public and with staff.
- Prioritize and coordinate tasks and events in a highly sensitive environment.
- Plan, organize, assign, supervise, and coordinate the work of clerical and technical staff.
- Train and evaluate assigned staff.
PLACER COUNTY
Executive Assistant to County Executive Officer (Page 4)

- Employ good judgement and make sound decisions in accordance with established procedures and policies.

- Research and prepare correspondence and reports.

- Computer/word-processing skills.

- Interpret and explain pertinent laws and rules.

- Understand, organize, index, and reference a wide variety of administrative information and records.

- Analyze situations carefully, recommend solutions, and adopt effective courses of action.

- Communicate clearly and concisely, both orally and in writing.

- Independently perform a variety of sensitive secretarial and administrative tasks.

- Establish and maintain effective working relationships with those contacted in the course of work.

- Work with various cultural and ethnic groups in a tactful and effective manner.

Experience and Training

- Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

  Experience:
  
  Five years of increasingly responsible secretarial experience including administrative support work for management personnel preferably in the public sector.

  Training:
  
  Equivalent to the completion of the twelfth grade preferably supplemented by secretarial/office management or general business college course work.

License or Certificate:

May need to possess a valid driver’s license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

Length of Probation:

All permanent appointments from open eligible lists to positions in the classified service shall serve a probationary period of twelve (12) months or two thousand eighty (2,080) hours, whichever is more.

Bargaining Unit:

Confidential
Recommendation

The Human Resources Department recommends the Civil Service Commission approve the proposed revisions to the classification specifications for Claims Specialist I/II and Senior Claims Specialist.

Background

The District Attorney’s Office recently requested a recruitment to fill a vacant Claims Specialist I position. While preparing to open the recruitment, subject matter experts found that some of the essential duties in the classification specifications for the Claims Specialist series do not accurately reflect the current processes and needs of the department. Updates to these sections of the classification specifications are recommended as outlined below.

Basis for Recommendation

Human Resources has worked closely with subject matter experts from the District Attorney’s Office to thoroughly review each of the classification specifications. This review revealed that the duties of interviewing victims for participating in designated programs, testifying before agency boards, and recovering victim property are now performed by other classifications. Also, the specific name of the state program, currently California Victim Compensation Board, dedicated to providing reimbursement for crime related expenses, has been removed to provide a more general description should the program change names in the future as it has in the past.

Pursuant to County Code section 3.08.520, the employees impacted by the classification specification changes have been notified of this recommendation and the action to move the request forward to the Civil Service Commission at today’s meeting. The Business Agent for
PPEO Stationary Engineers Local 39 has also reviewed the draft classification specifications and is in support of the recommended changes.

Attached for your review and consideration are copies of the classification specifications with the proposed updates noted, as well as an organizational chart for the District Attorney’s Office.

**Attachments**

1. Classification specification for Claims Specialist - I/II
2. Classification specification for Claims Specialist - Senior
3. Organizational chart for the District Attorney’s Office
CLAIMS SPECIALIST I
CLAIMS SPECIALIST II

DEFINITION
To assist victims with reimbursement from the state restitution programs; to provide information to victims of crime about the state restitution program within the criminal justice system; and to function as an integral and supportive member of the Victim/Witness multi-disciplinary team.

DISTINGUISHING CHARACTERISTICS
Claims Specialist I: This is the entry level class in the Claims Specialist series. This class is distinguished from the journey level by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters allocated to the journey level. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. Employees work under immediate supervision while learning job tasks.

Claims Specialist II: This is the full journey level class within the Claims Specialist series. This class is distinguished from the Claims Specialist I by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the entry level.

SUPERVISION RECEIVED AND EXERCISED
Claims Specialist I
Receives immediate supervision from the Victim/Witness Supervisor and may receive technical and functional supervision from other staff members.

Claims Specialist II
Receives general supervision from the Victim/Witness Supervisor and may receive technical and functional supervision from other staff members.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

- Interview victims for participation in designated programs as provided by local and State agencies such as the California Victim Compensation Board (Cal VCB); assist victims in completing victim of crime applications for restitution purposes; determine which documents will be necessary to support wage and/or medical losses on applications.

- Complete analysis of financial losses including those from medical expenses and wage losses; consider possible sources of reimbursement, i.e., insurance coverage, civil suit
settlements, restitution orders and public assistance programs; obtain verification from medical providers, employers, insurance companies and other agencies.

- Determine and request necessary verification/data to accurately evaluate and determine applicant’s eligibility for designated programs.
- Interpret and explain designated program regulations, obligations, procedures and other pertinent information on an individual basis, in person or by telephone, to applicants and participants.
- Maintain appropriate and accurate case records, documentation and files, including performing data entry into automated record systems; monitor and follow-up on due dates; prepare and maintain other documents associated with designated program areas and related reporting requirements.
- Establish status of cases involving benefits available to crime victims by contacting appropriate agencies.
- Testify before the agency boards on behalf of victims whose claims have been denied or set for discussion.
- Provide information to victims and witnesses of crime as to the Criminal Justice process and procedures.
- Assist victims in recovering their property when no longer needed for evidentiary purposes.

- Prepare correspondence, program information and related reports.
- Maintain records and statistics as requested by the Victim/Witness Supervisor.
- Perform various office support and clerical duties such as receiving and logging phone calls, typing and processing program forms.
- Travel to and from locations in a variety of outdoor weather conditions.
- Establish and maintain working relationships with other criminal justice and public and private agencies.
- Build and maintain positive working relationships with co-workers, other County and departmental employees, community agencies and resources, and the public utilizing principles of effective customer service.
- Perform related duties as required.

WORKING CONDITIONS

Work is typically performed in an indoor office environment with controlled temperature conditions.

MINIMUM QUALIFICATIONS

Claims Specialist I
Knowledge of:
- Basic financial record keeping practices.
- English usage, spelling, grammar and punctuation; basic mathematical calculations.
- Modern office procedures, methods and computer equipment.
- Interviewing techniques for obtaining factual and financial information.

Ability to:
- Learn the criminal justice system as it pertains to victim/witness activities.
- Learn regulations and procedures associated with victim compensation/restitution.
- On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers; identify and interpret technical and numerical information; explain designated and specific regulations and procedures to clients and the general public.
- On a continuous basis, sit at a desk for long periods of time; intermittently walk, stand, bend, climb, squat, twist and reach while retrieving or returning files or making field visits. Intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone and write or use a keyboard to communicate through written means; see with correctable acuity sufficient to read characters on computer screen; hear and speak with correctable acuity sufficient to communicate with clients; and lift light weight.
- Make rapid and accurate arithmetic calculations including addition, subtraction, multiplication and division.
- Learn to understand and apply complex laws and regulations.
- Learn to apply regulations and laws to a variety of situations affecting victims and witnesses.
- Effectively interview a wide variety of individuals from diverse cultural and socio-economic backgrounds and who may be physically, emotionally or mentally impaired or distressed.
- Maintain confidentiality.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Prioritize work in order to meet various program compliance deadlines.
- Obtain information through interview; work fairly and courteously with the public; handle multiple case assignments; and work effectively with interruptions.
- Analyze situations quickly and objectively and determine proper course of action within established guidelines and parameters.
- Use a computer, calculator, typewriter, telephone, facsimile machine, postage meter and a photocopy machine.
- Type at a speed necessary for successful job performance.
Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the performance of required duties.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

One year of general clerical experience involving interviewing and obtaining financial/personal history from the general public is desirable.

Training:

Equivalent to an Associate's degree from an accredited college or university with a major in criminal justice, accounting, public administration, business administration, or a closely related field.

License or Certificate:

May need to possess a valid driver’s license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

Must obtain certification from the California Victim Compensation Board (Cal VCB) for processing of applicant claims within twelve months of employment.

Length of Probation:

All permanent appointments from open eligible lists to positions in the classified service shall serve a probationary period of twelve (12) calendar months or two thousand eighty (2,080) hours, whichever is more.

Bargaining Unit:

Claims Specialist II

In addition to the qualifications for Claims Specialist I:

Knowledge of:

- Restitution agencies/programs rules and regulations, especially as related to eligibility criteria for participation.
- Pertinent local, State, and Federal laws.
- Regulations and procedures associated with victim compensation program.
- Community resources available to victim and witnesses.
Ability to:
- Apply complex laws and regulations to a variety of situations affecting victims and witnesses in an independent manner.
- Interpret financial statements and record necessary information for business, income tax purposes, investments, real and personal property.
- Prioritize work in an effective and timely manner.
- Utilize an automated system to enter/retrieve information and to track/monitor participants through program components.

Experience and Training
- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:
  
  **Experience:**
  Two years of responsible experience performing duties similar to a Claims Specialist I with Placer County.

  **Training:**
  Equivalent to an Associate's degree from an accredited college or university with a major in criminal justice, accounting, public administration, business administration, or a closely related field.

License or Certificate:
- May need to possess a valid driver’s license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.
- Must obtain certification from the California Victim Compensation Board (Cal VCB) for processing of applicant claims within twelve months of employment.

Length of Probation:
- All permanent appointments from open eligible lists to positions in the classified service shall serve a probationary period of twelve (12) calendar months or two thousand eighty (2,080) hours, whichever is more.

Bargaining Unit:
- General
CLAIMS SPECIALIST - SENIOR

DEFINITION
To perform the more difficult or complex work in assisting victims with reimbursement from the state restitution program to help pay bills and expenses that result from violent crime; to provide information to victims of crime about the criminal justice system; to provide administrative and technical support for program operations; to exercise technical and functional lead supervision over assigned staff; and to function as an integral and supportive member of the Victim/Witness multidisciplinary team.

DISTINGUISHING CHARACTERISTICS
This is the advanced journey level class in the Claims Specialist series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, as well as by the nature of the public contact required. Employees in this job class perform the most difficult and responsible types of duties assigned to classes within this series. Employees at this level are required to be fully trained in all procedures related to claims operations as well as aware of victim advocacy programs.

SUPERVISION RECEIVED AND EXERCISED
Receives general supervision from the Victim/Witness Supervisor.
Exercises technical and functional supervision over assigned staff.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

- Assign, review, coordinate and monitor the work performed by assigned staff to ensure claims are in accordance with regulatory guidelines.
- Provide technical and function lead supervision to assigned staff.
- Prepare and process the more complex claims through the State crime compensation database with general oversight from the state restitution program California Victim Compensation Board (Cal VCB).
- Provide claim-processing support to other counties per agreement with the Joint Powers Agreement (JPA) through the state restitution program California Victim Compensation Board (Cal VCB).
- Review and evaluate legislation, codes and administrative regulations to ensure program effectiveness and compliance with the requirements.
- Perform specialized assignments or projects as determined by the needs of the Department.
- Interview victims for participation in designated programs as provided by local and State agencies; assist victims in completing victim of crime applications for benefit eligibility.
purposes; determine which documents will be necessary to support wage and/or medical losses on applications.

- Complete analysis of financial losses including those from medical expenses and wage losses; consider possible sources of reimbursement, i.e., insurance coverage, civil suit settlements, restitution orders and public assistance programs; obtain verification from medical providers, employers, insurance companies and other agencies.

- Determine and request necessary verification/data to accurately evaluate and determine applicant’s eligibility for designated programs.

- Interpret and explain designated program regulations, obligations, procedures and other pertinent information on an individual basis, in person or by telephone, to applicants, participants and subordinate staff.

- Maintain appropriate and accurate case records, documentation and files, including performing data entry into automated record systems; monitor and follow-up on due dates; prepare and maintain other documents associated with designated program areas and related reporting requirements.

- Establish status of cases involving benefits available to crime victims by contacting appropriate agencies.

- Testify before the agency boards on behalf of victims whose claims have been denied or set for discussion.

- Provide information to victims and witnesses of crime as to the Criminal Justice process and procedures.

- Assist victims in recovering their property when no longer needed for evidentiary purposes.

- Prepare correspondence, program information and related reports.

- Travel to and from locations in a variety of outdoor weather conditions.

- Maintain records and statistics as requested by the Victim/Witness Supervisor.

- Establish and maintain working relationships with other criminal justice and public and private agencies.

- Build and maintain positive working relationships with co-workers, other County and departmental employees, community agencies and resources, and the public utilizing principles of effective customer service.

- Perform related duties as required.

**WORKING CONDITIONS**

*Work is typically performed in an office environment with controlled temperature conditions. Text*
MINIMUM QUALIFICATIONS

Knowledge of:

• Criminal justice system.
• Regulations and procedures of victim compensation program.
• Principles and practices of effective leadership including training, motivating, team building and assigning and reviewing work.
• Financial record keeping practices.
• English usage, spelling, grammar and punctuation; basic mathematical calculations.
• Modern office procedures, methods and computer equipment.
• Interviewing techniques for obtaining factual and financial information.
• Automated information systems utilized in case management.
• Modern office procedures, methods and computer hardware/software and its applications.
• English usage, spelling, grammar and punctuation; basic mathematical calculations.

Ability to:

• Train, assess, review and evaluate the work of subordinate staff.
• Prioritize the work of others in an effective and timely manner.
• Understand and apply complex laws and regulations in an independent manner, and interpret and explain complex regulations and procedures to less knowledgeable individuals.
• Counsel and assist victims and witnesses of crime in crisis situations.
• Deal with hostile and uncooperative victims and witnesses who are under emotional stress.
• Obtain information through interviews and conversation.
• Provide appropriate emotional support to traumatized clients.
• On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers; identify and interpret technical and emotional information; explain program regulations and procedures to victims and the general public.
• Utilize an automated system to enter/retrieve information and to track/monitor participants through program components.
• Effectively interview a wide variety of individuals from diverse cultural and socio-economic backgrounds and who may be physically, emotionally, or mentally impaired or distressed.
• Maintain confidentiality.
• Work with various cultural and ethnic groups in a tactful and effective manner.
• Act quickly and calmly in emergency situations.
• Recognize differences in human behavior resulting from cultural, financial and other forms of deprivation found in client populations.

• Analyze situations quickly and objectively and determine proper course of action.

• On a continuous basis, sit at a desk for long periods of time; intermittently walk, stand, bend, climb, squat, twist and reach while retrieving or returning files. Intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone and write or use a keyboard to communicate through written means; see with correctable acuity sufficient to read characters on computer screen; hear and speak with correctable acuity sufficient to communicate with clients; and lift light weight.

• Communicate clearly and concisely, both orally and in writing.

• Establish and maintain effective working relationships with those contacted in the performance of required duties.

Experience and Training

• Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

**Experience:**

Two years of responsible experience performing duties similar to a Claims Specialist II with Placer County.

**Training:**

Equivalent to an Associate's degree from an accredited college or university with a major in criminal justice, accounting, public administration, business administration, or a closely related field.

**License or Certificate:**

• May need to possess a valid driver’s license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

• Must obtain certification from the California Victim Compensation Board (Cal VCB) for processing of applicant claims within twelve months of employment.

**Length of Probation:**

• All permanent appointments from open eligible lists to positions in the classified service shall serve a probationary period of twelve (12) calendar months or two thousand eighty (2,080) hours, whichever is more.

**Bargaining Unit:**

• General
DATE: July 13, 2020
TO: Civil Service Commission
FROM: Kate Sampson, Director of Human Resources
BY: Valeriya Bachinsky, Human Resources Analyst
SUBJECT: Request for Reclassification – Information Technology Department

Recommendation

It is recommended that the Civil Service Commission approve:

a. The reclassification of one Information Technology Technician II position, GNRL Grade 100, to the classification of Information Technology Analyst I, PROF Grade 230; and

b. The non-competitive promotion of the incumbent pursuant to County Code section 3.08.480.

Background

At the request of the Information Technology (IT) Department, the Human Resources Department (HRD) conducted a classification review of an Information Technology Technician position. HRD, in conjunction with the IT Department, then presented the reclassification request to the IT Review Panel on May 20, 2020.

Basis for Recommendation

After a thorough review and analysis of the position information submitted by the department, and a comparison of the scope of this position relative to other classifications within the county, it has been determined by HRD, with concurrence by the IT Review Panel, that this position would be most appropriately classified as an Information Technology Analyst I.

Employees in the Information Technology Technician series perform a range of technical duties, typically in a help desk environment, to provide effective support for an assigned technology functional area. Employees in the Information Technology Analyst series perform duties related to the analysis, development, maintenance and administration of computer hardware and software systems to meet business needs.

Typical duties performed by the position being studied include:
• Monitors server network traffic, performance, and security; identifies and resolves security issues; checks server logs to detect intruders; ensures that outside storage for disaster recovery is adequate; provides recommendations for improved server and/or network performance security.

• Plans, determines requirements, designs, builds, customizes, tests, implements, maintains, and/or enhances a variety of hardware and software systems, integrating County network infrastructure and other systems.

• Provides professional customer support for system-related software issues, needs and requirements.

• Interfaces with clients to define project scope and review project activities, recommendations, and outcomes.

• Ensures that network and data systems comply with local, State and Federal mandates/regulations.

• Researches, recommends, designs, and manages large security infrastructure improvement projects.

• Prepares technical documentations, procedural plans, reports, correspondence, and other documents.

In contrast, the Information Technology Technician responsibilities include coordinating and providing technical support to County personnel, providing first-level and second-level assistance to customers, reviewing and tracking services requests, and performing workstation troubleshooting. These duties are customer service focused and do not rise to the higher level of complexity, analysis, and decision making performed by the incumbent in this position.

Pursuant to County Code section 3.08.520, the employee impacted by this reclassification has been notified of this recommendation and the action to move the request forward to the Civil Service Commission at today’s meeting. Pursuant to County Code 3.08.480 (A), this employee has also been determined to meet the minimum qualifications of the proposed classification and has been performing the duties listed above successfully for not less than one year. It is therefore requested that the incumbent be non-competitively promoted to the classification of Information Technology Analyst I.

Attached for your review is the organizational chart for the Information Technology Department. The Business Agent for Local 39, County Executive Office, and the Information Technology Department all concur with the recommendation described above.

**Attachment**

1. Information Technology Department Organizational Chart
DATE: July 13, 2020

TO: Civil Service Commission

FROM: Kate Sampson, Director of Human Resources

BY: Erica Priddle, Human Resources Analyst

SUBJECT: Retroactive Non-Competitive Promotion – Department of Health and Human Services – Human Services Division

Recommendation

Determine whether a retroactive non-competitive promotion be granted for employee number 51235196 in the Department of Health and Human Services - Human Services Division from the classification of Eligibility Specialist - I, Grade 55 to Eligibility Specialist - II, Grade 67, effective May 9, 2020.

Basis for Recommendation

It is the Human Resources Department’s practice to process non-competitive promotions to be effective the beginning of the pay period in which the information is transacted in the Workday payroll system. The Department of Health and Human Services had intended to make this non-competitive promotion effective May 9, 2020, when the employee qualified for the higher-level classification and was assigned and performing the duties at the full journey level.

A non-competitive promotion requires a current performance evaluation. The Human Services Division was delayed in processing this non-competitive promotion into the Workday payroll system until pay period 1 (beginning June 6, 2020), based on required edits to the evaluation. To ensure the employee is not negatively impacted by this delay, the department is requesting your Commission approve this retroactive non-competitive promotion.

This retroactive request, if approved, will cover the period from May 9, 2020 through June 5, 2020 (pay periods 25 and 26).

Attachment

1. Department Memo
MEMORANDUM

DATE: July 13, 2020
TO: Kate Sampson, Director of Human Resources
FROM: Jeffrey Brown, MPH, MSW, Director of Health and Human Services
SUBJECT: Retroactive Non-Competitive Promotion

The purpose of this recommendation is to provide justification for the retroactive non-competitive promotion of employee number 51235196 from the classification of Eligibility Specialist - I Grade 55 - Range A ($3,832.40 - $4,659.20 monthly) to Eligibility Specialist - II, Grade 67- Range A ($4,225.87 - $5,134.13 monthly).

Beginning May 9, 2020, this employee was assigned, and began performing the higher-level duties of an Eligibility Specialist II. It was the intent of the Department of Health and Human Services to non-competitively promote the employee effective May 9, 2020 (pay period 25). However, upon submission of the employee’s performance evaluation, a few inaccuracies were noted and subsequently sent back to the department for modification. This action inadvertently resulted in a delay in processing the non-competitive promotion. After the corrections were made, the performance evaluation was resubmitted to Human Resources on June 11, 2020, and at that time the non-competitive promotion and merit increase information was input into the Workday payroll system for processing.

Therefore, it is requested that the employee be non-competitively promoted retroactively, effective May 9, 2020, to align with the date the employee began performing the higher-level duties of an Eligibility Specialist II.
DATE: July 13, 2020
TO: Civil Service Commission
FROM: Kate Sampson, Director of Human Resources
BY: Suzanne Holloway, Human Resources Manager
SUBJECT: Recommendations from Countywide Classification Study - Account Clerk Series

Recommendation

The Human Resources Department recommends the Civil Service Commission approve:

a. The proposed revisions to the classification specifications for Account Clerk Entry, Account Clerk Journey, Senior Account Clerk and Accounting Technician;

b. The creation of a new classification of Payroll Technician, with the recommended salary grade of GNRL 73;

c. The reclassification of four Accounting Technician positions in the Auditor-Controller’s Office to the new classification of Payroll Technician, as well as the administrative placement of the current position incumbents;

d. The reclassification of one Account Clerk Journey position in the Sheriff’s Office to Senior Account Clerk, as well as the administrative placement of the current position incumbent;

e. The reclassification of one Account Clerk Journey position in the Department of Information Technology to Accounting Technician, as well as the administrative placement of the current position incumbent; and

f. The reclassification of one Senior Account Clerk position in the Department of Agricultural Commissioner & Farm Advisor to Accounting Technician, as well as the administrative placement of the current position incumbent.

Background

Late last year, the Human Resources Department contracted with Bryce Consulting to conduct a Countywide classification study of the Account Clerk and Accounting Technician series.
This study represents the third and final phase of the County’s comprehensive review of its fiscal and budgetary related classifications, with focus on the clerical and technical levels in the series. The first phase focused on the professional levels (including Accountant I/II, Senior Accountant, Supervising Accountant, Auditor I/II, Senior Auditor, and Supervising Accountant Auditor), and was approved by the Commission on July 10, 2017. The second phase focused on the management levels (including Administrative & Fiscal Officer I/II and Administrative & Fiscal Operations Manager), and was approved by the Commission on January 8, 2018, then updated on September 9, 2019.

This recent classification study encompassed a total of eighty-eight (88) positions allocated to the following County departments:

- Agricultural Commissioner/Farm Advisor
- Air Pollution Control District
- Assessor’s Office
- Auditor-Controller’s Office
- Clerk-Recorder/Registrar of Voters Office
- Community Resource Development Agency
- County Counsel
- County Executive’s Office
- Facilities Management
- Health & Human Services
- Information Technology
- Library Services
- Probation
- Public Works
- Sheriff’s Office
- Treasurer-Tax Collector

**Basis for Recommendation**

Per classification industry standards, allocation factors were used to measure job requirements of individual positions. These factors were compared to measure the similarities and differences among positions. The following allocation factors were used to develop the classification plan in this study:

- Duties and responsibilities assigned;
- Decision making;
- Scope and complexity;
- Contact with others required by the job;
- Supervision received and exercised;
- Knowledge, skills, and abilities required to perform the essential duties;
- Consequence of error.
Classification analysis is based on the work currently assigned and performed for each position; consequently, the following factors were not considered when making recommendations:

- duties performed occasionally or those not considered essential or critical;
- volume of work;
- employee job performance;
- personality/interpersonal skills;
- efficiency at performing job tasks;
- personal qualifications exceeding current job duty requirements;
- employee longevity/history with the County; and
- prior work experience or assignments that were at a higher level.

Methodology
The classification study was conducted using the following process:

- Employee orientations (kick-off meetings) with Bryce consultant staff, HR, and employees in the Account Clerk and Accounting Technician classification series were held for employees to hear the study process, receive and walk through the Position Inventory Questionnaire (PIQ), and ask questions.
- PIQs were distributed to study participants for completion.
- Upon employees' completion of the PIQ, supervisory and management staff reviewed the questionnaires for accuracy and provided additional comments.
- The consultant conducted a preliminary analysis of the submitted PIQs and completed interviews with most employees. The purpose of these interviews was to gain clarification and additional information regarding each position.
- Based on the information obtained through the questionnaires and interviews, the consultant analyzed the results and compared the duties to the current class specification.
- Incumbents were provided an opportunity to review and comment on the recommendation for their position prior to finalization.
- Each study participant who provided comments to their initial allocation recommendation received a written response from the consultant documenting the follow-up analysis and any changes made to the initial recommendations.
- The consultant made final recommendations for each position, as well as updates to the classification specifications based upon the information obtained from incumbents.
Results and Recommendations

Based on the consultant’s analysis and feedback received from incumbents and management, updates to the classification specifications for Account Clerk Entry/Journey, Senior Account Clerk and Accounting Technician are recommended to more accurately reflect the duties assigned, modernize job titles, and align with current industry language and terminology.

The Account Clerk and Accounting Technician classifications are designed to be broad classifications that can be used in multiple departments across the County. As a result, the current duty statements and knowledge and abilities required were very general and lacked descriptive detail. Feedback from staff in various departments indicated that the current class specifications did not sufficiently describe the work performed. Input obtained from County incumbents across all departments included additional detail that was added to the class specifications in order to more accurately describe the work being performed and reflect updated processes and technology, which will assist the County in future classification analyses and recruitment efforts. Descriptions of typical duties performed at each level, as well as distinguishing characteristics across levels in the series, are described in the consultant’s report (Attachment 1).

The consultant further recommended that the titles in the clerical levels of the series be updated, as the term “clerk” is outdated. Therefore, it is recommended that the title of “clerk” be replaced with the more modern and standard term of “assistant,” which is consistent with the labor market and complies with the Countywide classification plan.

An analysis of individual position allocations indicated that most were appropriately classified. A total of seven positions were assigned and performing duties outside the scope of their current classifications, and are therefore recommended to be reclassified as described below:

Auditor-Controller’s Office

With respect to payroll processing, the consultant noted that all County departments studied have a position(s) that processes payroll at the department level, with most also performing other accounting duties. Within the Auditor-Controller’s Office, there are positions solely responsible for the final steps related to processing payroll and serving as technical experts for other County departments on payroll-related matters. These positions do not perform other accounting duties. Further, the positions specializing in finalizing Countywide payroll functions within the Auditor-Controller’s Office require a more in-depth knowledge of procedures and laws related to payroll than those in other departments. Specifically, primary duties include the following:

- Review, audit, validate, and correct the information provided by the departments and special districts;
• Prepare a variety of payroll related reports such as those required by the California Public Employees’ Retirement System (CalPERS);
• Review, interpret and ensure the proper application of Memorandum of Understanding language as it relates to calculating payroll;
• Calculate State Disability Insurance integration with the employee’s normal pay for medical leave purposes;
• Calculate advance pay and retro pay;
• Validate and compute final leave balances;
• Calculate Fair Labor Standards Act rates for compensatory time earned;
• Process garnishments; and
• Process CalPERS retirement and long term disability payments.

While the complexity and level of work performed is similar, given the specific and specialized nature assigned, it is recommended that the Accounting Technician positions within the Auditor-Controller’s Office that perform payroll be reclassified to a newly created Payroll Technician classification, as this more accurately represents the job requirements. The proposed salary grade of GNRL 73 ($4,232.80 - $5,286.67 monthly) is the same as that of the Accounting Technician classification.

Sheriff’s Office
One Account Clerk Journey position assigned to the Administrative Division of the Sheriff’s Office is responsible for a variety of accounting tasks related to purchasing supplies and equipment for the department. Other duties include:

• Confirming authority and approvals for requests to purchase and making purchases on behalf of the Sheriff’s Office via credit card, supplier invoice or purchase order.
• Setting up, creating, and/or assisting employees with expense reports and request(s) to purchase (RTP).
• Ordering, reviewing, researching, and purchasing items/services requested in RTP forms.
• Confirming for accuracy, coding, and paying multiple Verizon bills for the Sheriff’s Office.
• Reconciling credit cards used for purchases.
• Collecting information from various departments and compiling numbers for yearly penal code book orders for the Sheriff’s Office, ordering from the vendor and delivering to departments.
Assisting in the input of supplier invoices; receiving purchase orders in Workday with proper coding in a timely manner.

Based on the level of responsibility assigned to the position with respect to performing detailed research on equipment for the Sheriff’s Office and the authority assigned to this position for purchasing, it is recommended that the position be reclassified to a Senior Account Clerk, which includes a change from salary grade GNRL 52 ($3,633.07 - $4,537.87 monthly) to GNRL 58 ($3,816.50 - $4,766.67 monthly).

Information Technology Department
One position currently classified as Account Clerk Journey is responsible for maintaining financial recordkeeping and statistical records; reviewing and reconciling financial and budget reports with source documents, such as purchase orders, payroll time reports, and other statistical reports; and receiving and reconciling revenues and disbursements. Additional duties assigned include the following:

- Running the general ledger after the close of each month and verifying coding for department purchases, payroll and activity codes; correcting errors via journal; maintaining the master payroll file; updating spreadsheets and making manual adjustments that coincide with the labor cost allocation so that the Workday payroll system matches Workday general ledger.

- Completing labor corrections via journal in Workday and adjusting the master payroll as needed.

- Creating monthly journals to bill County departments for services rendered; maintaining a master spreadsheet for tracking trends for each departments' cost center; completing data entry for monthly Financials for Information Technology (IT) Telecom Countywide Systems and Countywide Radio.

- Processing vendor payments for invoices; tracking vendor contracts; communicating shortages or deadlines to procurement division and the vendor's County contacts; updating each vendor tracking spreadsheet and ledger accounts.

- Training new employees on Workday time keeping software to ensure proper coding and comments are entered; assisting employees on correction or error alerts in Workday.

- Collecting, receiving, and depositing checks for both IT and Telecom payments from customers; balancing internal spreadsheets to Workday.

Follow up discussions with department management indicated that the scope and level of work performed by this position has evolved since IT separated from what was previously the department of Administrative Services to become its own stand-alone department. The
complexity and level of responsibility as it relates to the non-productive labor is more consistent with the technical level in the series; therefore, it is recommended that the position be reclassified to the Accounting Technician classification, which includes movement from salary grade GNRL 52 ($3,633.07 - $4,537.87 monthly) to GNRL 73 ($4,232.80 - $5,286.67 monthly).

Agricultural Commissioner & Farm Advisor
The administrative team for the Agricultural Commissioner & Farm Advisor is currently composed of a department head, assistant department head, Executive Secretary, and Senior Account Clerk. At the time the incumbent completed her PIQ she had been in the position approximately nine months and the Executive Secretary and assistant department head positions had been recently filled. The initial analysis of this position indicated that it was appropriately classified. However, following notification of her initial allocation recommendation, the incumbent requested that her position be re-evaluated by the consultant, as additional duties, responsibilities, and other new job functions had been omitted from her PIQ. Follow up discussions with department management confirmed that the incumbent has been responsible for accounts receivable, accounts payable, the creation of reports, supporting the budget process and grant administration since being hired and has taken on increased independence in contract management. Additional job functions include:

- Calculating, creating, and sending monthly state contract invoices which includes an evaluation of staff time and materials.
- Verifying, posting, and tracking state contract submitted invoices and payments.
- Calculating, creating, and sending monthly billing.
- Reconciling P-card statements including verifying purchases, coding purchases, and uploading receipts.
- Calculating, verifying, and reconciling mileage reimbursement and monitoring and tracking monthly travel expenditures.
- Calculating, verifying, and creating daily deposits.
- Preparing state reports.
- Monitoring and reviewing device registration accounts; preparing device registration review documents, ensuring required updates and device count adjustments are entered, and preparing final billing.
- Preparing annual financial report and annual financial statement.
- Compiling, preparing, and reviewing grant claims.
- Supporting annual budget development; compiling the revenue portion of budget.
Based on the updated level of responsibility assigned to the position with respect to budget, grant administration, and contract management, it is recommended that the position be reclassified to an Accounting Technician, which includes movement from salary grade GNRL 58 ($3,816.50 - $4,766.67 monthly) to GNRL 73 ($4,232.80 - $5,286.67 monthly).

Employee Review
As provided by the Placer County Code, Chapter 3, Section 3.08.520, each study participant had the opportunity to review both the study’s initial and final recommendations for their position and they have been notified that final recommendations will be heard by your Commission at today’s meeting. Each participant was also provided the opportunity to be heard by the Human Resources Director and/or to appeal the recommendation of their position to your Commission before the action becomes final. While there was one request for a follow-up review, once that review occurred and the employee was notified that no changes would be recommended, no further request for appeal was received.

Attached to this memo are the proposed updates to the classification specifications for Account Clerk Entry/Journey, Senior Account Clerk, and Accounting Technician, including a title change from “Account Clerk” to “Accounting Assistant;” the proposed new classification of Payroll Technician; the consultant’s report, including a full allocation list; and a listing of the seven positions proposed for reclassification identified by employee number. Each of the incumbents in these positions is eligible for placement into the new classifications pursuant to section 3.08.480 of the Placer County Code.

The Human Resources Department, all affected County departments, the County Executive Office, and the Business Agents for Placer Public Employees Organization/Stationary Engineers (Local 39) have all reviewed and support the recommended changes and updates described in this report.

**Attachments**

1. Draft Classification Specifications
2. Bryce Consulting Report of Findings
3. List of Reclassified/Impacted Positions
ACCOUNTING CLERK ASSISTANT – ENTRY/JOURNEY

DEFINITION
To perform difficult and responsible clerical accounting and financial work in support of specific assigned functional areas which may include accounts receivable, accounts payable, department payroll processing, treasury, and tax billing and collections; involving to perform financial recordkeeping and prepare statistical records; to review and reconcile financial and budget reports with source documents, invoices, purchase orders and other materials; to process financial and statistical documents, such as purchase orders, payroll time reports and statistical reports; and to receive and reconcile revenues and disbursements; and to receive and respond to questions from County staff, outside agencies and the public.

DISTINGUISHING CHARACTERISTICS
Accounting Clerk Assistant – Entry: This is the entry level class in the Accounting Clerk Assistant series. This class is distinguished from the journey level by the performance of the more routine tasks and duties assigned to positions within this series. The Accounting Clerk Assistant – Entry class is distinguished from the journey level by the performance of less than the full range of duties assigned to the journey level. Incumbents work under immediate supervision while learning job tasks, progressing to general supervision as procedures and processes of assigned area of responsibility are learned.

Accounting Clerk Assistant – Journey: This is the full journey level class within the Accounting Clerk Assistant series. This class is distinguished from the Accounting Clerk Assistant – Entry by the performance of the full range of duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the entry level. This class is distinguished from the Senior Accounting Clerk Assistant level in that the latter is an advanced journey level that provides functional and technical lead supervision over Accounting Clerks Assistant and/or performs the most difficult and complex work requiring specialized technical or functional expertise and are assigned specialized duties.

SUPERVISION RECEIVED AND EXERCISED
Accounting Clerk Accounting Assistant – Entry
Receives immediate supervision from assigned supervisory or management personnel and may receive technical and functional supervision from a Senior Accounting Clerk Accounting Assistant.
ACCOUNT CLERK ACCOUNTING ASSISTANT – JOURNEY

Receives general supervision from assigned supervisory or management personnel and may receive technical and functional supervision from a Senior Account Clerk Accounting Assistant.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:

- Perform clerical accounting, financial or bookkeeping work associated with the maintenance of journals and subsidiary ledgers, payroll, treasury, tax billing and collections, general ledgers, accounts receivable, accounts payable, fiscal controls and similar financial records.
- Prepare periodic statements and analyses of statistical and financial records related to area of assignment.
- Receive financial or statistical documents; screen for accuracy and adherence to legal and procedural requirements; carry out proper steps to ensure or authorize payments and delivery; post to records, check and balance totals.
- Make computations and changes to financial and statistical data, apply standard formulas or predetermined guides; assemble financial and statistical data from a variety of sources and prepare or assist in preparing financial and statistical reports.
- Receive and process a variety of payments at the front counter; review customer information for accuracy and research account status; generate receipt and respond to customer questions.
- Assist with the collection of delinquent accounts.
- May process time records and prepare payroll and related records. Review and process department payroll ensuring accuracy; research and correct errors; process leave requests; and respond to questions from department staff.
- Assist in the conduct of accounting and statistical studies and compute cost and revenue estimates.
- Process accounts payable involving the review and coding of invoices to appropriate contracts; verify materials are received and charges are accurate; monitor contracts to ensure sufficient funds for payment.
- Track and monitor contracts and insurance; create and/or make changes to supplier records, contract encumbrances and amendments.
- Prepare, review and approve cash, credit card and check receipts; perform account adjustments; reconcile and process refunds and overpayments.
- Research, verify and process warrant reissues.
- Collect and track a variety of data; prepare invoices, billings and/or claims and balance accounts; maintain customer/client accounts.
- Receive and review tax documentation.
- Classify and post expenditures, revenues or authorizations to the appropriate budgetary or ledger accounts; maintain records of postings; and reconcile to financial reports.
- Keep ledger accounts; balance accounts; review, identify and correct irregularities; assist with collections of delinquent accounts.
- May contact other governmental agencies, private agencies and County employees to obtain information for and clarify financial/statistical records and transactions.
- Operate standard office equipment including word processing applications as assigned; may perform duties on computer spreadsheet programs; operate stand alone computer software programs as related to assigned area.
Prepare complex financial or statistical reports and summaries independently; recommend improvements in financial recordkeeping procedures and systems. Assist in preparing budget estimates; prepare trial balances, recapitulations, balance sheets and complex statistical and financial reports. Meet with the public to obtain data, interpret information and answer questions; prepare routine correspondence to answer questions, request information or provide explanations. Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service. Perform related duties as assigned.

**EXAMPLES OF NON-ESSENTIAL DUTIES** – Duties may include, but are not limited to, the following:

May be required to deliver or pick up records, receipts and other information within the County from other departments, divisions or agencies. Order and maintain inventories of office supplies and related records. Receive payments and issue receipts.

**WORKING CONDITIONS**

Work is typically performed in an indoor office environment and controlled temperature conditions. Tasks may involve extended periods of time at a keyboard or workstation. Positions may require traveling to and from other locations in a variety of outdoor weather conditions and lifting materials and supplies of light weight.

**MINIMUM QUALIFICATIONS**

**Account Clerk/Accounting Assistant – Entry**

**Knowledge of:**

- Methods, practices and terminology used in financial and statistical recordkeeping.
- Arithmetic calculations related to statistical and financial record keeping.
- Principles and practices of computer hardware and software including word processing, spreadsheets and database packages
- Principles and practices of filing and record keeping.
- Basic office methods and equipment including filing and computer systems.
- Basic computer software and keyboarding.

**Ability to:**

- On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; perform simple grasping and fine manipulation; lift light weight.
• Intermittently, review documents related to Department operations; observe, identify and problem-solve office operations and procedures; understand, interpret and explain Department policies and procedures; explain operations and problem solve office issues for the public and with staff.

• Make arithmetic calculations rapidly and accurately.

• Post financial and statistical records using a personal computer or manual records.

• Learn the organization, procedures and operating details of the County Department to which assigned.

• Learn to use a personal computer and office equipment for successful job performance.

• Verify and check files and data.

• Understand and carry out both oral and written directions.

• Establish and maintain effective working relationships with the public and fellow employees of the County.

• Work with various cultural and ethnic groups in a tactful and effective manner.

• Communicate effectively in writing and speaking.

Experience and Training
• Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

  **Experience:**

  No experience required. One year of responsible clerical experience in keeping financial or statistical records is desirable.

  **Training:**

  Equivalent to the completion of the twelfth grade. Additional specialized training in bookkeeping, accounting or a related field is desirable.

License or Certificate:
• May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

**ACCOUNT CLERK ACCOUNTING ASSISTANT – JOURNEY**

In addition to the qualifications for the **Account Clerk Accounting Assistant – Entry**:

**Knowledge of:**
• Principles and practices of clerical accounting, financial and bookkeeping and statistical recordkeeping.
Common word processing and spreadsheet software used on a personal computer.

Modern office practices and procedures. Pertinent laws, codes and regulations.

Ability to:

- Independently perform difficult clerical accounting and financial recordkeeping work involving initiative and judgment.
- Perform clerical accounting or bookkeeping work associated with the maintenance of journals and subsidiary ledgers, general ledgers, accounts receivable, fiscal controls and similar financial records.
- Review financial or statistical documents; screen for accuracy and adherence to legal and procedural requirements; carry out proper steps to ensure or authorize payments and delivery, post to records, check and balance totals.
- Apply financial and statistical recordkeeping principles to the maintenance of statistical, accounting, financial and payroll transactions.
- Perform quick, accurate data entry.
- Operate a 10-key adding machine by touch.
- Organize tasks and determine priorities in order to meet assigned deadlines.

Experience and Training

- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

  **Experience:**
  
  Two years of responsible experience in keeping and reviewing financial records.

  **Training:**
  
  Equivalent to the completion of the twelfth grade. Additional specialized training in bookkeeping, accounting or a related field is desirable.

License or Certificate:

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.
SENIOR ACCOUNT ACCOUNTING CLERK ASSISTANT

DEFINITION
To perform the most difficult and complex clerical accounting, financial and statistical recordkeeping work in support of a specific assigned functional area that may include accounts receivable, accounts payable, department payroll processing, treasury, tax billing and collections, and contract administration; to perform work requiring specialized accounting and financial knowledge, abilities, skills and experience; and may provide technical and functional supervision of Account Accounting Clerks Assistants and other clerical personnel.

DISTINGUISHING CHARACTERISTICS
This is the advanced journey level class in the Account Accounting Clerk Assistant series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, by the amount of time spent performing the duties and by the nature of the public contact made. Employees perform the most difficult and responsible types of duties assigned to classes within this series requiring specialized knowledge, abilities, skills and experience and may provide technical and functional lead supervision over Account Accounting Clerk Assistant classes. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility.

SUPERVISION RECEIVED AND EXERCISED
Receives direction from assigned supervisory or management personnel. Exercises technical and functional supervision over Account Accounting Clerk Assistant and clerical positions.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:
- Perform complex clerical accounting, financial or bookkeeping work associated with the maintenance of journals and subsidiary ledgers, payroll, treasury, tax billing and collections, general ledgers, accounts receivable, accounts payable, fiscal controls and similar financial records.
- Develop schedules and methods to accomplish assignments ensuring work is completed in a timely and efficient manner.
- Participate in evaluating the activities of staff, recommending improvements and modifications.
- Provide and coordinate staff training; work with employees to correct deficiencies.
- Perform and/or supervise the coordination of the maintenance of journals and subsidiary ledgers, general ledgers, tax billing and collection, department payroll processing, accounts...
receivable and payable and similar accounting records, requiring specialized technical, functional or programmatic knowledge.

Personally perform the most technical, complex clerical recordkeeping transactions and may supervise the work of other personnel providing supporting bookkeeping or recordkeeping work.

Track cash receipts, returned checks and undeposited cash/checks.

Process complex claims which involve gathering and reviewing large quantities of data from a variety of sources and reports; calculate, create and send invoices and track payments; balance accounts.

Monitor supplier holds and process liens received by state and federal entities.

Prepare and approve wires from County departments and special districts and verify receipt.

Prepare and maintain complex computerized financial spreadsheets on a personal computer for ledgers, trusts and statistical records; prepare reports from spreadsheets summarizing information and financial records.

Assist in the interpretation of County, State and Federal regulations concerning financial and statistical transactions and reports; prepare financial and statistical reports for submission to State and Federal agencies.

Prepare periodic statements and analyses of statistical and financial records related to area of assignment.

Conduct accounting and statistical studies and compute cost and revenue estimates.

Classify and post expenditures, revenues, or authorizations to the appropriate budgetary or ledger accounts; maintain records of postings; and reconcile to financial reports.

Keep ledger accounts and collection accounts, balance accounts; review, identify and correct irregularities.

Receive financial or statistical documents; screen for accuracy and adherence to legal and procedural requirements; carry out proper steps to ensure or authorize payments; deliver documents, post to records, check and balance totals.

Research and resolve issues with reconciliation.

Make computations and changes to financial and statistical data, apply standard formulas or predetermined guides; assemble financial and statistical data from a variety of sources and prepare or assist in preparing financial and statistical reports.

Contact other governmental agencies, private agencies and County employees to obtain information for and clarify financial or statistical records and transactions.

Prepare complex financial or statistical reports and summaries independently; recommend improvements in financial recordkeeping procedures and systems.

Prepare budget estimates; prepare trial balances, recapitulations, balance sheets and complex statistical and financial reports.

Meet with the public to obtain data, interpret information and answer questions; prepare correspondence to answer questions, request information or provide explanations.

Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.

Perform related duties as assigned.
WORKING CONDITIONS

Work is typically performed in an indoor office environment and controlled temperature conditions. Tasks may involve extended periods of time at a keyboard or workstation. Positions may require traveling to and from other locations in a variety of outdoor weather conditions and lifting materials and supplies of light weight.

MINIMUM QUALIFICATIONS

Knowledge of:

- Principles and practices of advanced clerical accounting, financial and bookkeeping and statistical recordkeeping.
- Principles and practices of computer hardware and software including word processing, spreadsheets and database packages.
- Basic governmental accounting principles and practices.
- Common word processing and spreadsheet software used on a personal computer.
- Modern office practices and procedures.
- Arithmetic calculations related to statistical recordkeeping.
- Laws, ordinances, rules and regulations affecting accounting and assigned areas of responsibility in Placer County.
- Principles and techniques of technical and functional supervision and training.

Ability to:

- On a continuous basis, sit at desk and/or stand at counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; run errands; lift light weight.
- Intermittently, review documents related to Department operations; observe, identify and problem-solve office operations and procedures; understand, interpret and explain Department policies and procedures; explain operations and problem solve office issues for the public and with staff.
- Plan, assign, review and coordinate the work of others.
- Perform complex and varied statistical and financial recordkeeping, requiring specialized technical, functional or programmatic knowledge.
- Prepare complex financial reports and statements in accordance with predetermined requirements.
- Operate a 10-key adding machine by touch.
• Review financial or statistical documents; screen for accuracy and adherence to legal and procedural requirements; carry out proper steps to ensure or authorize payments and delivery, post to records, check and balance totals.

• Apply accounting, financial and statistical recordkeeping principles to the maintenance of statistical, accounting, financial and payroll transactions.

• Establish and maintain effective working relationships with those contacted in the course of work.

• Use modern office equipment and computers.

• Work with various cultural and ethnic groups in a tactful and effective manner.

• Communicate clearly and concisely, both orally and in writing.

Experience and Training

• Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

  Experience:

  Two years of responsible journey level experience performing duties similar to an Account Clerk Accounting Assistant – Journey with Placer County.

  Training:

  Equivalent to the completion of the twelfth grade. Additional specialized training in bookkeeping, accounting or a related field is desirable.

License or Certificate:

• May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.
ACCOUNTING TECHNICIAN

DEFINITION
To plan, organize, direct perform, and supervise the performance of accounting, financial and statistical recordkeeping work in support of assigned functional areas which may include accounts receivable, accounts payable, department payroll processing, treasury, tax billing and collections, and contract administration; to perform technical, sub-professional, accounting, finance and fiscal recordkeeping; and to prepare and review financial and statistical records; and to perform a variety of specialized technical tasks relative to assigned area(s) of responsibility.

DISTINGUISHING CHARACTERISTICS
This is the full journey level technical accounting class. Employees within this class are distinguished from the Account Accounting Clerk Assistant series by the performance of work that typically requires specialized college-level training in accounting and finance rather than bookkeeping, by performing a broad range of duties as assigned and typically including responsibility for a program area of accounting and/or supervision of Account Clerks Accounting Assistants. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

This class is distinguished from the Accountant – Auditor series and Auditor series in that the latter are at professional levels, requiring completion of a Bachelor's Degree in accounting or a closely related field.

SUPERVISION RECEIVED AND EXERCISED
Receives direction from assigned supervisory or management personnel.
May exercise supervision over Account Clerk Accounting Assistant classifications or general clerical personnel.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:
Recommend and assist in the implementation of goals and objectives related to assigned functional area; establish schedules and methods for clerical and technical financial, accounting and bookkeeping operations; prepare and implement clerical and technical financial and accounting policies and procedures.
Plan, prioritize, assign, supervise, and review the work of assigned staff; prepare and monitor schedules of assigned staff.
Evaluate operations and activities of assigned programs or functions; recommend improvements and modifications; ensure compliance with appropriate laws and regulations.
Perform and/or supervise the maintenance of journals and subsidiary ledgers, general ledgers, tax billing and collection, accounts receivable, accounts payable, department payroll processing and similar accounting records.

Personally perform technical, complex accounting and financial transactions and may supervise other personnel performing supporting bookkeeping, finance, or recordkeeping work.

Research and resolve the more complex matters with vendor and customer accounts.

Supervise and/or participate in the review and processing of department payroll ensuring accuracy; research and correct errors; process leave requests; and respond to questions from department staff.

Supervise and/or participate in the processing of accounts payable involving the review and coding of invoices to appropriate contracts; verify materials are received and charges are accurate; monitor contracts to ensure sufficient funds for payment.

Assist with the collection and compilation of data for budget purposes, ensuring correct revenue and expense reporting.

Prepare and maintain computerized financial spreadsheets on a personal computer for ledgers, trusts and statistical records; prepare reports from spreadsheets summarizing information and financial records.

Review Board of Supervisor agenda and Final Summaries for the approval of new contracts; set up new suppliers; analyze and reconcile supplier contract budgets; audit payments to ensure compliance with budget spending authority.

Analyze expenses and allocate to specific programs and activities.

Compile and submit required documentation for grant reimbursement and annual audit.

Process complex claims which involve gathering and reviewing large quantities of data from a variety of sources and reports; calculate, create and send invoices and track payments; balance accounts.

Maintain County fuel cards; review and analyze reports to ensure proper controls and adherence to County policies; conduct audit of card inventory and use.

Participate in the Auditor-Controller’s Office audit process; respond to questions and requests for documentation.

Receive, verify, track and distribute court fines and fees to County departments and State.

Audit annual tax roll extension to ensure property values are correct; verify tax rates to tax schedule; process changes to taxpayer assessment based on changes in the tax code.

Receive and process business license applications; prepare correspondence requesting additional information; track, record, maintain, calculate and distribute business license fees.

Prepare bulk transfers for the sale of businesses; research ownership and tax liabilities; prepare required documents; create refunds for overpayments.

Create notice of intent to lien as it relates to delinquent taxes; track collection notices, liens filed, and vessel holds and releases.

Prepare parcel splits which involves researching, verifying, calculating, estimating and preparing reports for developers and property owners.

Classify receipts and expenditures and record them to the appropriate project, accounts, funds, trusts, etc.; reconcile ledgers and accounts.

Balance financial information system controls; balance and post cash receipts, payments and registers; and balance various other statistical and financial transactions with source documents and controls.

Plan, organize and supervise the work of Account Clerks and other clerical personnel.
Perform tax default processing and collections.
Compile statistical data and prepare reports or summaries for submission to other departments in the County or outside agencies.
Interpret and apply County, State and Federal regulations concerning financial and statistical transactions and reports; prepare financial and statistical reports for submission to State and Federal agencies.
Transfer unclaimed funds in accordance with government code and County policy.
Maintain and reconcile inventory records, removing or adding items as requested; assist with inventory counts.
Meet with the public to obtain data, interpret information and answer questions; prepare correspondence independently to answer questions, request information, or provide explanations.
Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.
Perform related duties as assigned.

WORKING CONDITIONS
Work is typically performed in an indoor office environment and controlled temperature conditions. Tasks may involve extended periods of time at a keyboard or workstation. Positions may require traveling to and from other locations in a variety of outdoor weather conditions and lifting materials and supplies of light weight.

MINIMUM QUALIFICATIONS
Knowledge of:

- Principles and procedures of accounting and finance, and their application to governmental financial transactions.
- The application and operation of common word processing and spreadsheet software used on personal computers.
- Principles and practices of computer hardware and software including word processing, spreadsheets and database packages.
- Modern office procedures, practices, systems and equipment as applied to accounting and financial recordkeeping operations.
- Principles and practices of supervision, leadership, training, and performance management.
- Laws, ordinances, rules and regulations affecting accounting and assigned areas of responsibility in Placer County.
- Principles and techniques of supervision and training.

Ability to:

- Organize, implement, and direct clerical financial and accounting operations/activities.
On a continuous basis, sit at a desk and/or stand at a counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; run errands; lift light weight.

Intermittently, review documents related to Department operations; observe, identify and solve problems of office operations and procedures; understand, interpret and explain Department policies and procedures; explain operations and problem solve office issues for the public and with staff.

- Plan, assign and supervise the work of others; Supervise, train, motivate, and evaluate assigned staff.
- Identify problems and recommend appropriate action.
- Perform complex and varied accounting and financial recordkeeping.
- Interpret, explain, and apply operating policy, rules, and procedures of assigned function.
- Operate a 10-key adding machine by touch.
- Prepare complex financial reports and statements.
- Apply accounting principles to the maintenance of accounting, financial and payroll transactions.
- Use modern office equipment and computers.
- Establish and maintain effective working relationships with the public and fellow employees of the County.
- Work with various cultural and ethnic groups in a tactful and effective manner.
- Communicate effectively in writing and speaking.

**Experience and Training**

- Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

  **Experience:**

  Two years of responsible journey level experience performing duties similar to an Account Clerk, Accounting Assistant – Journey with Placer County.

  **Training:**

  Equivalent to the completion of the twelfth grade supplemented by college level coursework in accounting or a related field.

**License or Certificate:**

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.
PAYROLL TECHNICIAN

DEFINITION
To perform specialized technical payroll duties including preparing, reviewing, validating, finalizing and auditing County-wide payroll; to provide training and subject matter expertise related to payroll for other county departmental staff; to research and respond to payroll related questions; to interpret, apply and explain pertinent laws, policies, regulations, rules and MOU language; and to prepare and submit a variety of payroll related reports.

DISTINGUISHING CHARACTERISTICS
This is the full journey level technical payroll class. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

This class is distinguished from the Accounting Technician and Accounting Assistant in that former are responsible for payroll at the department level as well as other accounting and financial tasks whereas Payroll Technicians are specifically responsible for auditing, correcting and the final processing of County-wide payroll within the Auditor-Controller’s Office and prepare and submit payroll related reports.

SUPERVISION RECEIVED AND EXERCISED
Receives direction from assigned supervisory or management personnel.
May exercise technical, functional or direct supervision over clerical staff.

EXAMPLES OF ESSENTIAL DUTIES – Duties may include, but are not limited to, the following:
Perform specialized technical and highly detailed work in the preparation, review, finalization and auditing of payroll and payroll related records and reports within the Auditor-Controller’s Office.
Calculate State Disability Insurance integration for medical leave of absence; determine estimated weekly benefit.
Compute payments due relating to the payroll function, including but not limited to, taxes, insurance premiums, retirement and other benefit programs.
Process pay changes and payroll deductions including deferred compensation, retirement, and benefits.
Reconcile payroll reports with retirement and health benefit records.
Calculate and prepare payroll related general ledger entries; reconcile liabilities to the general ledger; prepare adjusting journal entries.
Audit timesheets received from County departments; calculate changes in salary due to promotions, demotions, and merit increases.
Review and validate medical benefits, pay rate, hours, CalPERS and other earnings and deductions to ensure payroll calculations are correct.
Perform a variety of specialty payroll calculations including advancements, retro pay, and wage garnishments.
Receive and respond to Verification of Employment for County employees.
Process and audit new hire documentation and termination/final pay warrants; validate and compute final leave balance accruals and FLSA rate for compensatory time earned.
Maintain records for employee payroll deductions and prepare reports and payments to various taxing, financial and insurance organizations, CalPERS and deferred compensation administrator.
Provide training to other departmental staff regarding specialized procedures and requirements of the payroll system; receive, research and respond to questions from County staff.
Maintain, calculate and verify employee leave records and prepare relevant reports.
Compile, research, and prepare a variety of periodic and special reports relating to the payroll function.
Research and resolve payroll discrepancies.
Organize and maintain various files; type correspondence, reports, forms and other financial documents.
Build and maintain positive working relationships with co-workers, other County employees and the public using principles of good customer service.
Perform related duties as assigned.

WORKING CONDITIONS

Work is typically performed in an indoor office environment and controlled temperature conditions. Tasks may involve extended periods of time at a keyboard or workstation. Positions may require traveling to and from other locations in a variety of outdoor weather conditions and lifting materials and supplies of light weight.

MINIMUM QUALIFICATIONS

Knowledge of:
- Principles and procedures of technical payroll accounting.
- Principles and practices of computer hardware and software including word processing, spreadsheets and database packages.
- Record keeping requirements, rules and regulations related to the payroll process.
- Payroll reporting laws and requirements of various state and federal agencies and insurance and financial firms.
- Basic business data processing principles and applications related to payroll processing.

Ability to:
- Perform specialized technical work related to the preparation, processing and maintenance of County’s payroll and payroll related records.
- Produce accurate payroll related reports.
• On a continuous basis, sit at a desk and/or stand at a counter for long periods of time. Intermittently twist and reach office equipment; write and use keyboard to communicate through written means; run errands; lift light weight.

• Intermittently, review documents related to Department operations; observe, identify and solve problems of office operations and procedures; understand, interpret and explain Department policies and procedures; explain operations and problem solve office issues for the public and with staff.

• Perform computational tasks and other technical functions with speed and accuracy; compile and reconcile numerical and financial data.

• Provide technical assistance in payroll procedures to departmental personnel; train and assist other staff as necessary.

• Use modern office equipment and computers.

• Maintain confidential payroll related information.

• Work effectively under deadlines.

• Establish and maintain effective working relationships with the public and fellow employees of the County.

• Work with various cultural and ethnic groups in a tactful and effective manner.

• Communicate effectively in writing and speaking.

Experience and Training

• Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of increasingly responsible journey level experience involving the preparation and processing of payroll and related documents.

Training:

Equivalent to the completion of the twelfth grade supplemented by college level coursework in accounting or a related field.

License or Certificate:

• May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.
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SECTION I - INTRODUCTION

Bryce Consulting was retained by the County of Placer to conduct a classification study involving 88 positions allocated to the classifications of Account Clerk – Entry, Account Clerk – Journey, Account Clerk – Senior, and Accounting Technician. This report presents the classification study results and recommendations and includes:

- Section I  Introduction
- Section II  Classification Conceptual Framework
- Section III  Classification Plan Recommendations

STUDY OBJECTIVES

In conducting the study, Bryce Consulting had the following objectives:

- To systematically describe in the classification plan the kinds of work currently performed by employees and the level of responsibility and difficulty of that work.
- To make allocation recommendations for each position based on the duties and responsibilities assigned.
- To recommend new or revised class specifications, if warranted.
- To allow for a review process that permits each employee to review the draft classification recommendation and to submit concerns directly to the consultant.
STUDY METHODOLOGY
To achieve the above objectives, the following tasks occurred:

- Employee orientations were held where employees were invited to hear the study process, receive and walk through the Position Inventory Questionnaire (PIQ), and ask questions.
- Position Inventory Questionnaires (PIQ) were distributed to employees to complete regarding their current position.
- Upon independent completion of the questionnaire by the employees, management personnel reviewed the questionnaires for accuracy and provided additional comments. The consultant then conducted a preliminary analysis of the information provided by the employees and management.
- The consultant conducted interviews with the majority of the employees. The purpose of these interviews was to gain clarification and additional information regarding each position.
- Based on the information obtained through the questionnaires and interviews, the consultant analyzed the results and compared the duties to the current class specification to determine the appropriateness.
- Incumbents were provided an opportunity to review and comment on the recommendation for their position prior to finalization.
- Bryce developed a draft report of the findings and recommendations which was reviewed by the Human Resources staff prior to finalization.
SECTION II - CONCEPTUAL FRAMEWORK

This section of the report presents a conceptual framework for the classification plan. The classification analysis as applied to positions within the County used sound principles of job evaluation and job analyses, focusing on the level and type of work as determined through the use of established allocation factors and class concepts.

The classifications emerging from the analysis represent a carefully designed classification structure tailored to the particular needs of the County. Within these job classes are positions that require a full range of knowledge, skills, and abilities to successfully accomplish a wide array of assignments. The class concepts as outlined on the following pages accommodate these diverse needs and requirements in a manner that encourages the highest degree of management flexibility possible. Finally, the proposed classifications emphasize the duties performed and responsibility exercised as documented through the job analysis process. This section elaborates upon these and other classification concepts used to build the proposed classification plan. The concepts addressed include the following:

Classification Levels
Class Series
Allocation Factors

CLASSIFICATION LEVELS
Position classification represents the grouping of jobs within the County into a systematic classification structure based on the interrelationship of the duties performed, nature and level of responsibilities and other work-related requirements of the jobs. Within the overall classification plan it is possible to generally categorize each classification according to the following possible levels:

Class Level
Entry
Journey
Advanced Journey

The levels within a job family reflect the organization and should be tailored to that organization's needs and priorities. The following subsections generally define the responsibilities to be assumed at each class level identified.
Entry level classes are designed to provide an on-the-job training opportunity to an employee who has limited directly related work experience and is not yet prepared to perform the full range of work assigned to the journey level class.

Journey level classes are designed to recognize those positions which require the incumbent to perform a broad range of tasks usually under general supervision. A journey level position is fully trained in the scope of duties associated with this level.

Advanced Journey level classes possess a specialized technical or functional expertise. They typically are assigned significant responsibilities above the journey level, possess specialized knowledge, abilities, skills, and experience, and often exercise independent judgment in the performance of their duties. Advanced journey level classes may provide technical, functional or lead supervision over lower level positions.

ALLOCATION FACTORS
Allocation factors are standards that are used to measure job requirements of individual positions. These factors can be compared in order to measure the similarities and differences among positions. The allocation factors used to develop the Classification Plan are:

- Decision Making
- Scope and Complexity
- Contact with Others Required by the Job
- Supervision Exercised and Received
- Knowledge, Skills and Abilities

These criteria are briefly defined below:

**Decision Making**
This standard consists of (a) the decision making responsibility and degree of independence or latitude that is inherent in the position and (b) the impact of the decisions.

**Scope and Complexity**
This standard defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.

**Contact with Others Required by the Job**
This standard measures (a) the types of contacts and (b) the purpose of the contacts.
Supervision Received and Exercised
This standard describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position.

Knowledge, Skills and Abilities
This standard defines the knowledge, skills and abilities necessary to perform assigned responsibilities.

These allocation factors have been carefully and consistently applied during the analysis of each position included in the scope of the study. They are then compared with the same elements to positions that involve similar kinds of work. Not all factors will be as pertinent to all positions and each factor is analyzed in accordance with the importance of that particular factor to the kind of job under study. Positions are classified according to the nature and kind of duties assigned to the position. The assignment of additional duties of a similar nature to a position does not justify a higher classification. Redistributing work or adding employees, not reclassifying existing positions, properly solves problems of excessive workload.
SECTION III - CLASSIFICATION PLAN ALLOCATIONS

This section presents the classification plan and includes the allocation of positions to recommended classes.

ALLOCATION OF POSITIONS TO CLASSES

Each position included in the scope of the study has been allocated to an appropriate class within the recommended classification plan. While the majority of the positions are appropriately classified, a few positions have been found to be misclassified. An allocation list is provided in Appendix A with the specific findings and recommendations for those positions found to be misclassified detailed on the following pages. Revisions to the classification specifications have been recommended and are contained in Appendix B.

CONCEPT OF ACCOUNT CLERK SERIES

The Account Clerk series is responsible for performing difficult and responsible clerical work involving financial recordkeeping and statistical records; reviewing and reconciling financial and budget reports with source documents, invoices, purchase orders and other materials; processing financial and statistical documents, such as purchase orders, payroll time reports and statistical reports; and receiving and reconciling revenues and disbursements. The series consists of an entry, journey and advanced journey level with the entry level learning to perform the duties, the journey performing the full scope of work independently, and the advanced journey level serving as a lead and/or performing the more complex duties assigned to the series. According to the job description, the Account Clerk – Entry and Journey may be responsible for:

- Performing clerical accounting or bookkeeping work associated with the maintenance of journals and subsidiary ledgers, tax billing and collections, general ledgers, accounts receivable, fiscal controls and similar financial records.
- Preparing periodic statements and analyses of statistical and financial records related to area of assignment.
- May process time records and prepare payroll and related records.
- Assisting in the conduct of accounting and statistical studies and computing cost and revenue estimates.
- Classifying and posting expenditures, revenues or authorizations to the appropriate budgetary or ledger accounts; maintaining records of postings; and reconciling to financial reports.
Keeping ledger accounts; balancing accounts; reviewing, identifying and correcting irregularities; assisting with collections of delinquent accounts.

Receiving financial or statistical documents; screening for accuracy and adherence to legal and procedural requirements; carrying out proper steps to ensure or authorize payments and delivery; posting to records, checking and balancing totals.

Making computations and changes to financial and statistical data, applying standard formulas or predetermined guides; assembling financial and statistical data from a variety of sources and preparing or assisting in preparing financial and statistical reports.

May contact other governmental agencies, private agencies and County employees to obtain information for and clarify financial/statistical records and transactions.

Preparing complex financial or statistical reports and summaries independently; recommending improvements in financial recordkeeping procedures and systems.

Assisting in preparing budget estimates; preparing trial balances, recapitulations, balance sheets and complex statistical and financial reports.

Meeting with the public to obtain data, interpret information and answer questions; preparing routine correspondence to answer questions, request information or provide explanations.

The Account Clerk – Senior may be responsible for:

Performing and/or supervising the maintenance of journals and subsidiary ledgers, general ledgers, tax billing, accounts receivable and payable and similar accounting records, requiring specialized technical, functional or programmatic knowledge.

Personally performing the most technical, complex clerical recordkeeping transactions and may supervise other personnel providing supporting bookkeeping or recordkeeping work.

Preparing and maintaining computerized financial spreadsheets on a personal computer for ledgers, trusts and statistical records; preparing reports from spreadsheets summarizing information and financial records.

Assisting in the interpretation of County, State and Federal regulations concerning financial and statistical transactions and reports; preparing financial and statistical reports for submission to State and Federal agencies.

Preparing periodic statements and analyses of statistical and financial records related to area of assignment.

Conducting accounting and statistical studies and computing cost and revenue estimates.
• Classifying and posting expenditures, revenues, or authorizations to the appropriate budgetary or ledger accounts; maintaining records of postings; and reconciling to financial reports.

• Keeping ledger accounts and collection accounts, balancing accounts; reviewing, identifying and correcting irregularities.

• Receiving financial or statistical documents; screening for accuracy and adherence to legal and procedural requirements; carrying out proper steps to ensure or authorize payments; delivering documents, posting to records, checking and balancing totals.

• Making computations and changes to financial and statistical data, applying standard formulas or predetermined guides; assembling financial and statistical data from a variety of sources and preparing or assisting in preparing financial and statistical reports.

• Contacting other governmental agencies, private agencies and County employees to obtain information for and clarify financial or statistical records and transactions.

• Preparing complex financial or statistical reports and summaries independently; recommending improvements in financial recordkeeping procedures and systems.

• Preparing budget estimates; preparing trial balances, recapitulations, balance sheets and complex statistical and financial reports.

• Meeting with the public to obtain data, interpret information and answer questions; preparing correspondence to answer questions, request information or provide explanations.

CONCEPT OF ACCOUNTING TECHNICIAN

The Accounting Technician performs and supervises technical, sub-professional, accounting, finance and fiscal recordkeeping and prepares and reviews financial and statistical records. Duties include:

• Performing and/or supervising the maintenance of journals and subsidiary ledgers, general ledgers, tax billing, accounts receivable and payable and similar accounting records.

• Personally performs technical, complex accounting and financial transactions and may supervise other personnel performing supporting bookkeeping, finance, or recordkeeping work.

• Preparing and maintaining computerized financial spreadsheets on a personal computer for ledgers, trusts and statistical records; preparing reports from spreadsheets summarizing information and financial records.
• Classifying receipts and expenditures and recording them to the appropriate accounts, funds, trusts, etc.; reconciling ledgers and accounts.

• Balancing financial information system controls; balancing and posting cash receipts, payments and registers; and balancing various other statistical and financial transactions with source documents and controls.

• Planning, organizing and supervising the work of Account Clerks and other clerical personnel.

• Performing tax default processing and collections.

• Compiling statistical data and preparing reports or summaries for submission to other departments in the County or outside agencies.

• Interpreting and applying County, State and Federal regulations concerning financial and statistical transactions and reports; preparing financial and statistical reports for submission to State and Federal agencies.

• Meeting with the public to obtain data, interpreting information and answering questions; preparing correspondence independently to answer questions, request information, or provide explanations.

CLASSIFICATION RECOMMENDATIONS

The Account Clerk and Accounting Technician classifications are designed to be broad classifications that can be used in multiple departments across the County. The positions under review perform a wide variety of clerical and technical accounting duties such as payroll, both at the department level and County-wide level, accounts payable, accounts receivable; receiving and processing property tax payments; and receiving and processing money into the centralized County treasury. With the widespread use of the classifications, the class specifications are fairly broad and non-specific. Furthermore, the title is outdated. It is recommended that the Account Clerk series title be changed to Accounting Assistant. Furthermore, it is recommended that the class specifications be revised to be more descriptive of the duties performed by positions within the classifications. The following pages provide the recommendations for positions whereby a change in classification is recommended.

Employee Number: 51236340
Current Classification: Account Clerk – Journey
Recommended Classification: Accounting Technician
The position is currently classified as Account Clerk – Journey and is responsible for maintaining financial record keeping and statistical records; reviewing and reconciling financial and budget reports with source documents, such as purchase orders, payroll time reports, statistical reports; and receiving and reconciling revenues and disbursements. Additionally, according to the incumbent, duties include:

- Running the General Ledger after the close of each month and verifying coding for department purchases, payroll and activity codes; correcting errors via journal; maintaining the master payroll file; updating spreadsheets and making manual adjustments that coincide with the labor cost allocation so that the Workday payroll system matches Workday General Ledger.

- Completing labor corrections via journal in Workday and adjusting the master payroll as needed.

- Creating monthly journals to bill County departments for services rendered; maintaining a master spreadsheet for tracking trends for each departments’ cost center; completing data entry for monthly Financials for IT Telecom County Wide Systems and County Wide Radio.

- Processing payroll which includes creating a master payroll spreadsheet to verify cost account coding for each program, verifying hours, verifying policy to ensure time reported codes are being used correctly and ensuring corrections are made.

- Creating a variety of reports for management.

- Processing vendor payments for invoices; tracking vendor contracts; communicating shortages or deadlines to procurement division and the vendor’s County contacts; updating each vendor tracking spreadsheets and ledger accounts.

- Training new employees on Workday Time Keeping software to ensure proper coding and comments are entered; assisting employees on correction or error alerts in Workday Time Keeping.

- Collecting, receiving, and depositing checks for both TT and Telecom payments from customers; balancing internal spreadsheets to Workday.

Based on the complexity and level of responsibility as it relates to the non-productive labor, it is recommended that the position be reallocated to Accounting Technician.
The position is currently classified as Account Clerk – Journey and is responsible for a variety of accounting tasks related to purchasing supplies and equipment for the Sheriff’s Office. According to the incumbent, duties include:

- Confirming authority and approvals for request to purchase and making purchases on behalf of the Sheriff’s Office either via credit card, supplier invoice or purchase order.
- Setting up, creating, and/or assisting employees with expense reports and Requests to Purchases.
- Ordering, reviewing, researching and purchasing items/services requested in RTP (request to purchase) forms.
- Confirming for accuracy, coding, and paying multiple Verizon bill for the Sheriff’s Office.
- Reconciling credit cards used for purchases.
- Collecting information from various departments and putting together numbers for yearly penal code book orders for the Sheriff’s Office, ordering from the vendor and delivering to departments.
- Receiving and issuing deliveries for items purchased.
- Assisting in the input of supplier invoices; receiving purchase orders in workday with proper coding and within timely manner.

Based on the level of responsibility assigned to the position with respect to performing detailed research on equipment for the Sheriff’s Office and authority for purchasing, it is recommended that the position be reallocated to Accounting Assistant – Journey.

The position is currently classified as Account Clerk – Senior and is responsible for a variety of accounting tasks related to purchasing supplies and equipment for the Sheriff’s Office. According to the incumbent, duties include:

- Confirming authority and approvals for request to purchase and making purchases on behalf of the Sheriff’s Office either via credit card, supplier invoice or purchase order.
- Setting up, creating, and/or assisting employees with expense reports and Requests to Purchases.
- Ordering, reviewing, researching and purchasing items/services requested in RTP (request to purchase) forms.
- Confirming for accuracy, coding, and paying multiple Verizon bill for the Sheriff’s Office.
- Reconciling credit cards used for purchases.
- Collecting information from various departments and putting together numbers for yearly penal code book orders for the Sheriff’s Office, ordering from the vendor and delivering to departments.
- Receiving and issuing deliveries for items purchased.
- Assisting in the input of supplier invoices; receiving purchase orders in workday with proper coding and within timely manner.

Based on the level of responsibility assigned to the position with respect to performing detailed research on equipment for the Sheriff’s Office and authority for purchasing, it is recommended that the position be reallocated to Accounting Technician.
The position is currently classified as Account Clerk – Senior and is responsible for accounts receivable, accounts payable, the creation of reports, supporting the budget process and grant administration. According to the incumbent, duties include:

- Calculating, creating and sending monthly state contract invoices which includes an evaluation of staff time and materials.
- Verifying, posting, and tracking state contract submitted invoices and payments.
- Calculating, creating and sending monthly billing.
- Reconciling P-card statements including verifying purchases, coding purchases and uploading receipts.
- Calculating, verifying, and reconciling mileage reimbursement and monitoring and tracking monthly travel expenditures.
- Calculating, verifying and creating daily deposits.
- Preparing state reports.
- Monitoring and reviewing device registration accounts; preparing devise registration review documents, ensuring required updates and device count adjustments are entered and preparing final billing.
- Preparing annual financial report and annual financial statement.
- Compiling, preparing and reviewing grant claims.
- Supporting annual budget developing; compiling revenue portion of budget.

Based on the level of responsibility assigned to the position with respect to budget, grant administration and contract management, it is recommended that the position be reclassified to Accounting Technician.

**Employee Number:** 51235197, 51236387, 51231873, and 01169511

**Current Classification:** Accounting Technician

**Recommended Classification:** Payroll Technician

The positions are currently allocated to Accounting Technician within the Auditor-Controller’s Officer. With respect to payroll processing, County departments have a position that processes
payroll at the department level, with most also performing other accounting duties. Within the Auditor-Controller’s Office, the positions are solely responsible for the final steps related to processing payroll and serving as technical experts for other County departments on payroll related matters. These positions do not perform other accounting duties such as most positions within the departments. Furthermore, the positions within the Auditor-Controller’s Office require a more in depth knowledge of procedures and laws related to payroll than those in the departments. For instance, the positions review, audit, validate, and correct the information provided by the departments and special districts; prepare a variety of payroll related reports such as CalPERS; review, interpret and ensure the proper application of MOU language as it relates to calculating payroll; calculate SDI integration with the employee’s normal pay for medical leave purposes; calculate advance pay and retro pay; validate and compute final leave balances; calculate FLSA for comp time earned; process garnishments; and process CalPERS Retirement Payments and Long Term Disability payments. Given the specific and specialized nature of what the positions are responsible for, it is recommended that the Accounting Technician positions within the Auditor-Controller’s Office that perform payroll be reclassified to a newly created Payroll Technician classification.
### SUMMARY OF RECLASSIFICATIONS RESULTING FROM BRYCE CLASSIFICATION STUDY
As of June 1, 2020

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<th>Employee ID</th>
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DATE:       July 13, 2020
TO:         Civil Service Commission
FROM:       Kate Sampson, Director of Human Resources
SUBJECT:    Review of Merit Increases for Eligible Classified County Employees

During the closed session of your meeting, your Commission will review the performance evaluations of classified County employees pursuant to Government Code Section 54957. For those classified County employees determined to be eligible for a merit increase, the following motion is submitted for your consideration:

Motion to approve the classified merit awards set forth in the list dated July 13, 2020, pursuant to Section 3.04.650 of the County Code.
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<th>Name</th>
<th>Classification</th>
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<td>Leftwich, Maria</td>
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### Classified Staff Merit Increases Presented to Civil Service Commission on July 13, 2020

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<tr>
<th>Name</th>
<th>Classification</th>
<th>Current Salary</th>
<th>At Increase</th>
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