



COUNTY OF HUMBOLDT

AGENDA ITEM NO.
C-13

For the meeting of: April 28, 2015

Date: March 30, 2015
To: Board of Supervisors
From: Phillip R. Crandall, Director
Department of Health and Human Services
Subject: Revision to the Data Entry Operator job classification description and title change to Support Services Assistant I/II/III

RECOMMENDATION(S):

That the Board of Supervisors:

- 1. Approve the revisions to the job class description for the 37.5 hour class of Data Entry Operator I/II (class 0137, salary range 258/292) and the 40 hour class of Data Entry Operator I/II (class 1137, salary range 271/305), and change the job title for each to Services Support Assistant I/II; and
- 2. Approve the revisions to the job class description for the 37.5 class of Senior Data Entry Operator (class 0194, salary range 314) and the 40 hour class of Senior Data Entry Operator (class 1194, salary range 327), and change the job title for each to Services Support Assistant III; effective immediately following approval.

SOURCE OF FUNDING:

Social Services Fund

Prepared by Yvonne Winter, Deputy Director - ES
CAO Approval Amy Olsen
REVIEW: Auditor [Signature] County Counsel Personnel [Signature] Risk Manager Other

TYPE OF ITEM:
 Consent
 Departmental
 Public Hearing
 Other

BOARD OF SUPERVISORS, COUNTY OF HUMBOLDT
Upon motion of Supervisor Lovelace Seconded by Supervisor Bass
Ayes Sundberg, Lovelace, Fennell, Bohn, Bass
Nays
Abstain
Absent

PREVIOUS ACTION/REFERRAL:
Board Order No. _____
Meeting of: _____

and carried by those members present, the Board hereby approves the recommended action contained in this Board report.

Dated: April 28, 2015
By: [Signature]
Kathy Hayes, Clerk of the Board

DISCUSSION:

In 2014, Merit Systems Services (MSS) initiated an agency wide classification study of the MSS Data Entry Operator classification in response to the changing business needs of Social Service agencies. On November 14, 2014; MSS submitted a revised and final classification study report to Department of Health and Human Services (DHHS). The MSS report identified a group of Social Services employees currently classified as Data Entry Operators that should be reclassified into the classification series of Services Support Assistants due to the nature of their responsibilities and the type of duties they perform.

The revisions do not fundamentally change the job duties of the classification as they are updating and removing obsolete information and language no longer needed; therefore there is no recommendation to adjust the current salary range(s) for these positions.

The following employees will be affected and will need the following changes:

1. Reclassify Christa Portillo from Data Entry Operator I/II (class 1137, salary range 271/305) to Services Support Assistant I/II, and
2. Reclassify Raymond Williams from Data Entry Operator I/II (class 1137, salary range 271/305) to Services Support Assistant I/II, and
3. Reclassify Nancie Baker from Data Entry Operator I/II (class 1137, salary range 271/305) to Services Support Assistant I/II, and
4. Reclassify Pam Forbes from Data Entry Operator I/II (class 1137, salary range 271/305) to Services Support Assistant I/II, and
5. Reclassify James Martin from Data Entry Operator I/II (class 1137, salary range 271/305) to Services Support Assistant I/II, and
6. Reclassify Jeanne Silva from Data Entry Operator I/II (class 1137, salary range 271/305) to Services Support Assistant I/II, and
7. Reclassify Marlene Hall from Senior Data Entry Operator (class 1194, salary range 327) to Services Support Assistant III.

FINANCIAL IMPACT:

Approval of the Data Entry Operator and Senior Data Entry Operator classes will have no impact on the approved budget for fund 1160, budget unit 511 – Social Services in fiscal year 2014-15. The classification changes will remain at the same salary ranges.

Approving the classification change supports the Board's Strategic Framework by providing for and maintaining infrastructure.

OTHER AGENCY INVOLVEMENT:

Humboldt County Human Resources
Merit Systems Services

ALTERNATIVES TO STAFF RECOMMENDATIONS:

None

ATTACHMENTS:

County Human Resources Report
Merit Systems Services Classification Study
Job Descriptions –Services Support Assistant I/II/III

November 14, 2014

To: Phillip Crandall, Director
Yvonne Winter, Deputy Director
Humboldt County Health and Human Services Agency

CC: Dan Fulks, Human Resources Director

From: Tameka Usher, MSS Program Manager

Subject: Recommended Classification for Data Entry Operator Series Staff

Last summer, Merit System Services (MSS) initiated a classification study of the Data Entry Operator series. Because counties use a variety of employees in different classifications to perform MEDS clerical duties, the study included employees in other positions that were assigned Medi-Cal Eligibility Data System (MEDS) clerical duties. The existing Data Entry Operator classification series is outdated and MSS plans to abolish this classification. MSS developed the new MSS classification series of Services Support Assistant to replace the Data Entry Operator series. These new classification specifications are now final and available on our website for county use.

While CalHR asked MSS not to require counties to implement changes in classification wide studies pending decisions to transfer to an Approved Local Merit System (ALMS), counties can voluntarily make these changes. Because this is a system wide study, anyone in the existing Data Entry Operator classification series will be administratively reclassified to the new title. There is no need for a competitive recruitment process. We recommend you change the title for these staff from the Data Entry Operator classification series to the Services Support Assistant classification series.

This report is specifically tailored to your department and only includes position allocations for your departmental staff who were in the Data Entry Operator classification.

Please review this report carefully. Karen Rodriguez will be contacting you soon to discuss implementation of these recommendations. If you have any questions regarding this report, please contact Karen Rodriguez at 916-471-3348 or at krdriguez@cpshr.us.

DATE: November 14, 2014

CONFIDENTIAL

Data Entry Operator Classification Study

Humboldt County Health and Human Services Agency

SUBMITTED BY:

Merit System Services
241 Lathrop Way
Sacramento, CA 95815
www.mss.ca.gov
www.cps.ca.gov

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SECTION I – BACKGROUND AND PURPOSE

Merit System Services (MSS) is committed to creating, maintaining, and enhancing the job classifications for use across the 29 Interagency Merit System (IMS) counties. MSS continually performs classification maintenance studies to ensure that MSS classification specifications accurately reflect the duties, knowledge, abilities, and minimum qualifications required to meet the counties' needs, and to verify that individual positions within the IMS counties are allocated to the proper MSS classification.

As part of the classification maintenance plan, MSS initiated a classification study of the Data Entry Operator classification series. The proposed scope of the study included a general review of the existing MSS classifications of Data Entry Operator I, Data Entry Operator II and Data Entry Operator III. The work plan included comprehensive reviews of all Social Services positions that are allocated to the above classifications; and included Position Description Questionnaire (PDQ) review of employees in other classifications who perform MEDS clerical functions as a primary duty. MEDS clerical duties have been allocated to a variety of classifications throughout the MSS counties based on individual county workload needs and staffing levels. The study plan included an assessment of the duties performed and review of the Data Entry Operator classification which resulted in the classification specification being updated and renamed to Services Support Assistant. Implementation of recommendations will be accomplished through follow-up by MSS staff with each county on an individual basis.

30 counties were contacted and asked to identify who performed the MEDS clerical duties in their counties. 29 counties responded. 52 PDQs from 17 counties were reviewed. These PDQs were from Data Entry Operators, Account Clerks, Account Technicians, and all levels of Office Assistants. PDQs were not required from counties that identified case workers, supervisors, analysts, or managers who were performing these functions as part of their duties.

This report contains updated individual analyses of the positions for Humboldt County, which can be found in Section VII of this report. A summary list of the positions is also found at the end of this report.

SECTION II – METHODOLOGY

The following steps were taken by the MSS project team to implement this classification study:

1. Electronic Position Description Questionnaires (PDQ's) were custom designed to reflect the types of duties performed and to require a minimum amount of time from incumbents who were asked to complete the information. The PDQ's requested information about incumbents' current duties and responsibilities, as well as other pertinent job content data.
2. MSS records were used to identify the various positions in each county that would be included in the study. All positions in the following core MSS classifications were identified:
 - a. Data Entry Operator I
 - b. Data Entry Operator II
 - c. Data Entry Operator III

In addition, positions where the incumbent performed MEDS clerical duties were also identified by each county as appropriate for the study based on the nature of the duties performed.

3. Based on all of the positions identified above, PDQ's were electronically distributed to each affected Social Service department, along with a letter to each department director asking for their assistance and support for the study.
4. After the employee completed the PDQ, their supervisor and manager were asked to review the PDQ and add comments, if any.
5. The MSS study team reviewed all of the PDQs received as well as county organizational charts and pertinent MSS classification specifications. To further clarify information documented in the PDQ's, team members conducted classification interviews with supervisory and management staff, as needed via telephone.
6. The study team evaluated the duties of each position for which a PDQ was submitted. All of the PDQ data was analyzed to determine the scope of duties performed and if the MEDS clerical duties were the preponderant duties of the positions.
7. If the county used the position of Data Entry Operator for MEDS clerical duties, MSS recommends the counties adopt the new classification series of Services Support Assistant. This classification series was created by revising the existing Data Entry Operator series. Changes in title, tasks and/or required competencies were also made to better reflect the variety of tasks performed. When creating the new classification series, broad language was used so that the series could be used for other positions that may perform comparable duties so that positions could be allocated to an appropriate MSS classification.
8. The MSS team determined the appropriate classification for each position for which a completed PDQ was submitted. As appropriate, MSS will be contacting departments on an individual basis to share the recommendations and to discuss appropriate classifications that may be appropriate for their departments.

SECTION III – CLASSIFICATION CONCEPTS AND PRINCIPLES

This section describes the general classification concepts and principles applied during this study. These are consistent with standard classification practices.

POSITION, CLASSIFICATION, SERIES, AND JOB FAMILY

A **position** represents a group of duties and responsibilities performed by one employee. In contrast, **classification (or class)** refers to a position or a group of positions that are sufficiently similar in duties and responsibilities that they may be treated the same for purposes of pay, general minimum qualifications, title and a variety of other administrative activities.

A class **series** may be established when two or more classes are related to each other in a linear or related fashion. Typically, classes may be placed in series when the work performed in the classes is similar in nature but not in level, and when the work performed at the lower level class helps develop the knowledge, skills and abilities to perform work at the higher level.

A **job family** is a group of classes and/or class series' that are closely related. Classifications in a job family usually have similarities in their employment requirements that may support career progression. However, classes in the same job family may still require different levels of education, experience, skill, effort, or responsibility. For example, a financial job family may include clerical, technical, professional/analytical, supervisory and management classes.

CLASSIFICATION VERSUS ALLOCATION

Classification is the process of identifying and describing the various kinds of work in an organization and grouping similar positions together under the same common job title. **Allocation** is more specifically tied to the placement and/or budgeting of positions within an organization. Thus, a recommendation to allocate a position within an organization is based on the results of the classification analysis for that position.

SUFFICIENT SIMILARITY

It is easy to see that several positions belong to the same class when the duties are *identical*. In practical application, however, the duties and responsibilities of positions need not be identical in order to be placed in a common class. Instead, classification plans generally place positions into classes based on a determination of "sufficient similarity", whereby positions may share certain core responsibilities even though incumbents perform different individual tasks. However, within an individual organization, the interpretation of "sufficient similarity" can vary. A *broad* and/or *deep* interpretation accepts substantial scope and/or level variation between positions and results in broad classes. In contrast, a *narrow* and/or *shallow* interpretation might create separate narrow and/or shallow classes to address such variations.

The use of broad/deep versus narrow/shallow classifications is a policy decision, which is undertaken based upon an organization's goals and objectives. Both structures have advantages and disadvantages. For example, complex classification structures with multiple job families, multiple class series, and multiple levels within each series can be difficult to administer. In contrast, broad/deep classes are generally easier to administer, involving fewer recruitments and fewer classification adjustments. However, when class concepts are excessively broad and/or deep, recruitments may not successfully generate applicants with the skills needed for particular positions, and position classification maintenance (and responding to out-of-class complaints) can be difficult, time consuming and expensive. Clearly, a balance between too broad/deep and too narrow/shallow is best.

In general, when the type of work assigned to different positions varies dramatically, it often makes sense to place them in separate job families so that valid market comparisons can be made. Further, when the level of work within a job family has clear, job-related distinctions, separate classes usually offer the most efficient way to classify the work that is actually being done.

It should be noted that MSS prefers to utilize broad classifications whenever possible and appropriate.

WHOLE JOB ANALYSIS

For purposes of this study, MSS utilized a whole job analysis approach. This approach compares jobs with one another on the basis of an overall evaluation of difficulty or performance. The entire position, including the skills required, the decision-making authority, the scope, and the magnitude and accountability, are compared as a whole to another position. Comparisons may also be made between groups of positions rather than simply on an individual position basis.

PREPONDERANCE

Since positions may be assigned a wide range of duties and incumbents may have various levels of responsibility, position classification is based on the *preponderant* duties. Since preponderance considers *importance*, it should be noted that the most time-consuming duties of a position are

not necessarily preponderant, nor are the most responsible and complex duties. However, such is the case much of the time.

CLASSIFICATION OF THE JOB, NOT THE EMPLOYEE

Classification of a position should be consistent regardless of who occupies the position. As such, the study process classifies *positions*, not individual *employees*. In fact, positions are generally evaluated based on what they would look like if vacant or occupied by other employees.

Furthermore, classification does not consider the capabilities of individual employees or the efficiency and effectiveness of an incumbent. It is not a measure of how well an individual employee performs. Clearly, one can see that classification is not a tool to reward individual achievement, nor should classes be created simply to reward length of service.

LEVEL AND NOT VOLUME OF WORK

Position classification is a reflection of the *level* of work performed by an employee, and thus it is generally independent of volume. If one employee processes double the work of another, yet if they spend the same percentages of time on those tasks and other duties are comparable, they will be placed in the same class. In fact, study questionnaires do not ask for, and the consultant does not consider, the relative productivity of employees as a classification factor. A classification study does not consider the amount of time spent on tasks or the volume of work produced, because problems of excessive workload are properly solved by redistributing work or adding employees, and not by reclassifying existing positions.

STANDARD CLASSIFICATION FACTORS

In order to develop classification/allocation recommendations, each position is first analyzed based on the nature of work performed. Nature of work refers to the occupation, profession or subject matter field in which each position falls. Positions that perform work of a similar nature are considered to be in the same "job family". Within each job family, the level of the position is then determined. To determine the level of a position, it is evaluated against the following factors:

- **Decision Making** - This 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 defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.
- **Contact with Others Required by the Job** - This measures (a) the types of contacts, and (b) the purpose of the contacts.
- **Supervision Received and Exercised** - This 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 defines the knowledge, skills, and abilities necessary to perform assigned responsibilities.

These factors were carefully and consistently applied during the analysis of each position included in the scope of the study. 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.

SECTION IV – BASIC JOB CHARACTERISTICS

THE NATURE OF THE WORK

Within a job family, several classifications and/or class series' can exist, depending on the general nature of work assigned to each position group. For example, an administrative support job family may include clerical, technical and professional classes and/or series'.

CLASSIFICATION LEVELS

An appropriate classification plan groups positions into a systematic classification structure based on the inter-relationship of the duties performed, nature and level of responsibilities, and other work-related requirements. As part of this process, classification levels are established.

We have determined that the following class levels either apply to the positions in this study or are pertinent to discussions in this report:

- **Entry/Training Level** - Classes are designed to provide an on-the-job training opportunity to an employee who had limited directly related work experience and is not yet prepared to perform the full range of work assigned to the journey-level class; in some instances this level is also used for positions which require the acquisition of necessary certifications. In the administrative support job family, Services Support Assistant I is an example of an entry/training level classification.
- **Journey Level** - Classes are designed to recognize those positions that 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. In the administrative support job family, Services Support Assistant II is an example of a journey level classification.
- **Advanced Journey/Lead Level** - Classes require advanced and specialized technical or functional expertise. They typically are assigned significant responsibilities above the journey level; possess advanced and specialized knowledge, abilities, skills, and experience and often exercise substantial independent judgment in the performance of their duties. Positions at this level may also be distinguished by the provision of technical and/or functional supervision (lead work) to lower level positions. In the administrative support job family, Services Support Assistant III is an example of an advanced journey/lead level classification.

The number of levels within a class series is based upon organizational needs and priorities. However, regardless of how many levels exist, class levels should be clearly distinguished based on the general amount of responsibility to be assumed at each class level. We have identified these levels as appropriate for the positions included in this study based upon sound principles of job evaluation and analyses. This study primarily involved one job family. Our recommendations are consistent with the Merit System classification framework currently as it is utilized by the Interagency Merit System counties.

SECTION V – FLEXIBLE STAFFING

Flexible staffing is a commonly used administrative tool that recognizes positions where the organizational need for assigning work spans more than one class level. In a flexibly staffed position, an employee may be initially appointed to one class level (e.g., the entry level), and then be promoted to the next level (e.g., the journey level) without a competitive process. The most common flexible staffing involves entry and journey-level classes, e.g., the Services Support Assistant I and II classes are designed to be flexibly staffed.

Flexible-staffing is most common and appropriate in situations where an organization is willing to hire employees at an entry level and provide training to develop the journey level skills to perform progressively more complex work over time. The process works because few organizations have a long-term need for entry-level workers, and most will begin to assign journey-level work to a position when the incumbent has the ability to perform such work. By flexibly staffing the position, the organization gets the benefit of bringing new employees into the organization at a lower (and less costly) level, while allowing the organization to appropriately classify their positions if/when the duties change without going through a cumbersome recruitment or classification process.

It must be remembered that moving from one level to the next higher level in a flexibly staffed series is considered a promotion without an official, merit-based test, so the employee's performance actually becomes the test. Accordingly, the manager/supervisor must provide written measurement of the performance with particular attention to timeliness, accuracy and detail. The employee's performance should be at a level that clearly demonstrates a promotion is warranted. Criteria for advancement should be determined in advance of implementing flexible staffing and be sufficiently well understood that it can be articulated to all staff. Where flexibly staffed positions exist in multiple divisions, the development and application of consistent promotional criteria is essential.

SECTION VI – MERIT CLASSIFICATIONS

As part of this study, we have made amendments and/or title changes to the former MSS Data Entry Operator classification specifications, including updates to the typical duties, minimum qualifications and changing the title to Services Support Assistant. Because the changes were so extensive, we essentially created a new classification. We also deleted the Data Entry Operator Supervisor classification since it has not been used. A brief summary of each classification and the analysis behind the class concepts is provided below.

- **Services Support Assistant I/II** – These classes are the entry and journey levels in the Services Support Assistant series. Incumbents are responsible for operating a variety of automated systems, equipment or specialized software programs; such as MEDS, C-IV, CWS/CMS, CMIPS, etc. Incumbents perform data management responsibilities for program support functions and perform a variety of specialized administrative support work for a Department's programs and functions.
- **Services Support Assistant III** – This is the advanced journey or lead level in the Services Support Assistant classification series. Incumbents assigned to this class perform duties that require detailed, specialized, and technical knowledge in the use of state and county operating systems and/or programs; perform complex administrative support work for a Department's programs and functions.

SECTION VII – STUDY ANALYSES AND FINDINGS

The following section of the report contains the analyses and recommendations for the individual positions in the study. A summary table of the position classification findings may be found at the end of this report.

Name:	Nancie Baker and Pam Forbes
Current Classification:	Data Entry Operator I/II
Recommended Classification:	Services Support Assistant I/II

Based on the Position Description Questionnaires (PDQs), the incumbents are performing journey-level support duties related to MEDS (Medi-Cal Eligibility Data System). The incumbents solve discrepancies between the county eligibility software (C-IV) and the state database. These positions complete transactions requested by eligibility workers in order to grant eligibility, discontinue eligibility, issue temporary or BIC cards, or update critical data. These transactions can be immediate needs for clients with urgent medical issues, or solving problems that can take several days with follow-up needed. These positions also interface with other outside agencies such as Social Security Administration, DHCS (Dept. of Health Care Services) and other counties. The incumbents solve all Worker Alerts, received as Daily, Renewal (monthly alerts) and Recon (quarterly alerts) either by notifying case workers of actions needed to maintain or discontinue eligibility, or by resolving discrepancies between the state and county systems. The incumbents can escalate critical issues by submitting Remedy tickets to the state. Answering questions for both eligibility staff and clients regarding inquiry screens or eligibility concerns, maintaining accurate records including updating addresses, birth & identity matches, and combining multiple client ID numbers are daily tasks.

These duties are appropriate for the **Services Support Assistant II** classification.

Name:	James Martin
Current Classification:	Data Entry Operator I/II
Recommended Classification:	Services Support Assistant I/II

Based on the Position Description Questionnaire (PDQ), the incumbent is performing journey-level support data entry duties related to enrolling IHSS care providers. The incumbent checks documents for accuracy, enters in CMIPS II and makes sure all processes are complete. The incumbent resolves discrepancies and calculates prorated hours on IHSS time sheets. The incumbent conducts monthly orientations for IHSS care providers and assists payroll with employment verifications and live scan deposits.

These duties are appropriate for the **Services Support Assistant II** classification.

Merit System Services
Data Entry Operator Classification Recommendation

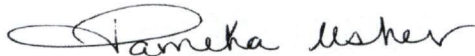
Name:	Jeanne Silva, Ashley Garrett (vacant) and Holly Bettis (vacant)
Current Classification:	Data Entry Operator I/II
Recommended Classification:	Services Support Assistant I/II
<p>Based on the Position Description Questionnaires (PDQs), the incumbents were performing journey-level support duties related to data entry into the Child Welfare Case Management System (CWS/CMS). Referrals for child abuse and neglect are entered into CWS/CMS. These positions are also responsible for conducting online research or due diligence to locate absent parents, input and update placement and caretaker information in to the computer system; and create and maintain databases for client information.</p> <p>These duties are appropriate for the Services Support Assistant II classification for Jeanne Silva. When the vacant positions are filled, they should be filled at the Services Support Assistant I/II level.</p>	

Name:	Marlene Hall
Current Classification:	Data Entry Operator III
Recommended Classification:	Services Support Assistant III
<p>Based on the Position Description Questionnaire (PDQ), the incumbent is performing advanced journey-level support duties related to MEDS (Medi-Cal Eligibility Data System). The incumbent performs MEDS Coordinator duties. The incumbent resolves discrepancies between the county eligibility software (C-IV) and the state database. The position completes transactions requested by eligibility workers in order to grant eligibility, discontinue eligibility, issue temporary or BIC cards, or update critical data. The positions also interface with other outside agencies such as Social Security Administration, DHCS (Dept. of Health Care Services) and other counties. The incumbent resolves all Worker Alerts, received as Daily, Renewal (monthly alerts) and Recon (quarterly alerts) either by notifying case workers of actions needed to maintain or discontinue eligibility, or by resolving discrepancies between the state and county systems. The incumbent can escalate critical issues by submitting Remedy tickets to the state and participates in statewide workgroups; provides training to county staff and answers questions for both eligibility staff regarding inquiry screens or eligibility concerns, maintains accurate records including updating addresses, birth and identity matches, and combines multiple client ID numbers to prevent duplicate cases.</p> <p>These duties are appropriate for the Services Support Assistant III classification.</p>	

SECTION VIII –SUMMARY

This report outlines the classification analyses for the Humboldt County Health and Human Services Agency positions studied during the Data Entry Operator Classification Study. We welcome your questions and feedback regarding these recommendations.

MSS will contact the county to proceed with implementation of the classification changes as outlined above. If you require additional clarification on the contents of this report, please contact Karen Rodriguez, krodriguez@cpshr.us. Thank you.



Tameka Usher, MSS Program Manager

11/14/14

POSITION CLASSIFICATION SUMMARY TABLE

Name	Current Classification	Recommended Classification
Nancie Baker	Data Entry Operator II	Services Support Assistant II
Pam Forbes	Data Entry Operator II	Services Support Assistant II
Marlene Hall	Data Entry Operator III	Services Support Assistant III
James Martin	Data Entry Operator II	Services Support Assistant II
Jeanne Silva	Data Entry Operator II	Services Support Assistant II
Vacant	Data Entry Operator I/II	Services Support Assistant I/II
Vacant	Data Entry Operator I/II	Services Support Assistant I/II



County of Humboldt
Human Resources/Risk Management
825 5th Street, Room 100
Eureka, CA 95501

Date: March 20, 2015

To: Phillip Crandall, Director of Health and Human Services

From: Becke Perry, Human Resources Analyst

Subject: Human Resources Report Regarding Merit System Services' Classification Study for Data Entry Operator Series

In 2014, Merit System Services (MSS) initiated an agency wide classification study of the MSS Data Entry Operator classification in response to the changing business needs of Social Service agencies. On November 14, 2014, Merit System Services submitted a revised and final classification study report to your department. In it, MSS identified groups of Social Service employees currently classified as Data Entry Operators that should be reclassified into the Services Support Assistant classifications due to the nature of their responsibilities and the type of duties they perform.

The revisions do not fundamentally change the job duties of the classification as they are updating and removing obsolete information and language no longer needed. Therefore, there is no recommendation to adjust the current salary range(s) for these positions.

The Human Resources Department has reviewed the report and agrees with its findings. The AFSCME Union was also consulted and has no objections to the revised job descriptions.

You will need to prepare a report to the Board of Supervisors with the following recommendation:

“That the Board of Supervisors:

1. Approve the Revisions to the job class description for the 37.5 hour class of Data Entry Operator I/II (class 0137, salary range 258/292) and the 40 hour class of Data Entry Operator I/II (class 1137, salary range 271/305), and change the job title for each to Support Services Assistant I/II; and
2. Approve the Revisions to the job class description for the 37.5 hour class of Senior Data Entry Operator (class 0194, salary range 314) and the 40 hour class of Senior Data Entry Operator (class 1194, salary range 327), and change the job title for each to Support Services Assistant III,

effective immediately following approval.”

Included in your report to the board in the discussion section you should identify the employees that are affected including the new classification:

1. *Christa Portillo to Services Support Assistant I*

2. *Raymond Williams Services Support Assistant I*
3. *Nancie Baker to Services Support Assistant II*
4. *Pam Forbes to Services Support Assistant II*
5. *James Martin to Services Support Assistant II*
6. *Jeanne Silva to Services Support Assistant II*
7. *Senior Data Entry Operator* position currently occupied by Marlene Hall to *Services Support Assistant III*

Upon board approval your Department will need to submit a PPAF identifying the revised class title for each affected employee, and include the following language "Additionally, anniversary dates will not be effected/remain the same".

For informational purposes, please include a copy of this report, along with a copy of the revised and final MSS classification study report dated November 14, 2014, with your report to the Board of Supervisors.

If you have any questions regarding this report please feel free to contact me at 476-2349.

cc: Yvonne Winter

Services Support Assistant I

Services Support Assistant II

CLASSIFICATION DEFINITION

The Services Support Assistant I and II operates a variety of department automated systems, equipment, or specialized software programs (such as MEDS, C-IV, CWS/CMS, CMIPS, etc.); performs data management responsibilities for program support functions; performs a variety of specialized clerical duties in support of professional and technical casework staff; and performs related work as required.

Services Support Assistant I

Working under close supervision, the Services Support Assistant I is the entry/trainee level in the Services Support Assistant series. Employees in this class receive in-service training, and are given detailed instructions in the operation of state and county data operating systems and perform tasks that are more structured and repetitive than those assigned at level II. As requisite skills and knowledge are developed, greater independence and the full scope of responsibility are exercised. Unless a position is permanently allocated to level I due to the nature of the work, employees are expected to promote to the Services Support Assistant II level after one year of satisfactory performance at the trainee level.

Services Support Assistant II

Working under general supervision, the Services Support Assistant II classification is the journey level in the Services Support Assistant series. Employees at this level are expected to be fully qualified and able to operate a variety of data operating systems and programs used by the department in order to perform day-to-day assignments with a sustained high level of speed and accuracy. Positions in this class are flexibly staffed and are normally filled by advancement from the lower level of Services Support Assistant I, or if filled from the outside, require prior related experience.

The Services Support Assistant I/II classification differs from Office Assistant I/II classification in that the primary function of the former is to perform administrative program support and data management for a Department's automated systems, requiring a sustained high level of speed and accuracy. The primary function of an Office Assistant I/II is office support, including a variety of clerical activities related to filing, reception, form processing, record maintenance, and mail as well as some data entry.

SUPERVISION EXERCISED AND RECEIVED

Incumbents in the Services Support Assistant I/II classification typically receive supervision from an Office Assistant Supervisor, or other higher-level supervisor or

manager.

TYPICAL DUTIES

Duties may include, but are not limited to, the following. For Services Support Assistant I, duties are performed at the trainee level:

- Performs data entry transactions for case management, aid authorization, imaging, and/or statistical data maintenance
- Operates a variety of operating systems, software, or related equipment for which routines and procedures are well defined and there is limited requirement for interpretation and adaptation of instructions to support a department's programs, services, and administrative functions
- Maintains files and generates routine reports and documents using system resources
- Reviews and reconciles system information (MEDS, C-IV, CWS/CMS, CMIPS, or other automated systems); assesses and updates records; may take other corrective action as authorized
- Researches procedures, regulations, and/or technical materials as necessary
- Uses manuals, utilization guides, and All County Letters (ACL); System Change Requests (SCR), etc. to review upcoming changes to regulations, programs and systems to keep knowledge current
- Troubleshoots problems with individual records, cases or participants by applying rules and regulations; provides information to and interacts with case workers to correct issues or coordinates with the help desk to solve problems
- Coordinates with department supervisors and management in producing and maintaining files, information systems, and composing and creating reports
- Gathers data, conducts surveys, prepares reports, and develops training materials for system users. Creates spreadsheets, report formats, forms, and record maintenance systems
- Responds to a variety of public, staff, and management inquiries, providing the requisite information, or referring the requests to supervisory and staff as appropriate
- Attends meetings and represents the department at meetings with other departments and agencies for information sharing, system improvements and implementation of changes
- Assists in special projects designated by the department management
- Performs related duties as assigned

EMPLOYMENT STANDARDS

Note: The level and scope of the knowledge and skills listed below are related to job duties as distinguished between the two levels in the Definition section.

Knowledge of:

- Personal computer operating systems, software applications (MS Office, etc.)

and related equipment

- Statewide operating systems (C-IV, MEDS, CWS/CMS, CIMPS, etc.)
- Department programs, functions and objectives
- Legislation, rules, regulations, policies and procedures related to multiple public assistance programs and related case administration techniques
- Work methods and techniques used by program staff
- Methods and techniques used in researching, proofing, evaluating, gathering, organizing, and arranging data
- Report writing and proper format and style
- Effective methods of training and presentations skills
- Record keeping and time-management practices and procedures
- Modern office practices and procedures
- Correct English usage, spelling, grammar, and punctuation
- Basic arithmetic

Ability to:

- Understand and carry out oral and written instructions
- Exercise sound and independent judgment in determining and selecting appropriate processes, alternatives, forms and desired actions within established work practices, procedures and commonly used regulations
- Learn and perform assigned tasks and routines
- Learn and develop skills with computer software programs or automated systems
- Evaluate and interpret information using an automated system and troubleshoot identified problems
- Prepare a variety of reports, correspondence, documents, statistical data, graphs, and charts using a computer and software packages
- Provide training and assistance for others in using assigned systems or software
- Read and understand detailed and complicated instructions
- Understand, interpret and apply rules and regulations; determine the impact of regulations on local operations and systems
- Organize work and budget time efficiently
- Work productively under time pressure and with interruptions
- Exercise tact when dealing with others
- Establish and maintain cooperative working relationships with those contacted in the course of work

MINIMUM QUALIFICATIONS (Education and/or Experience)

Services Support Assistant I:

EITHER

One (1) year of full-time experience performing financial or statistical recordkeeping; or producing a variety of work products using a statewide automated system or software applications;

OR

Successful completion of thirty (30) collect semester units or forty-five (45) quarter units from an accredited college or university.

Services Support Assistant II:

One (1) year of full- time experience performing duties of a Services Support Assistant I

OR

Two (2) years of full-time experience performing financial or statistical recordkeeping; or producing a variety of work products using a statewide automated system or software applications;

OR

Successful completion of thirty (30) collect semester units or forty-five (45) quarter units from an accredited college or university.

AND

One (1) year of full-time experience performing financial or statistical recordkeeping; or producing a variety of work products using a statewide automated system or software applications.

DRIVER LICENSE REQUIREMENT

Some positions in this classification may require possession of a valid California driver's License. Employees who drive on County business to carry out job-related duties must possess a valid California driver's license for the class of vehicle driven and meet automobile insurability requirements of the County. Eligibility for employment for those who do not meet this requirement due to disability will be reviewed on a case-by-case basis by the appointing authority.

SERVICES SUPPORT ASSISTANT III

CLASSIFICATION DEFINITION

Under limited supervision, the Services Support Assistant III operates automated systems or specialized software programs (such as MEDS, C-IV, CWS/CMS, CMIPS, etc.); performs complex program support functions; performs a variety of specialized duties in support of professional and technical staff; and performs related work as required.

The Services Support Assistant III level within the Services Support Assistant classification series is the fully experienced, advanced journey level. Incumbents assigned to this class perform duties that require detailed, specialized, and technical knowledge in the use of state and county operating systems and/or programs; perform complex administrative support work for a Department's programs and functions.

The Services Support Assistant III classification differs from the next lower class of Services Support Assistant II in that employees within the Services Support Assistant III classification perform more complex work and may provide direction to other clerical support staff. The Services Support Assistant III classification differs from the Office Assistant III classification in that the primary function of the former is to perform complex administrative support and data management for a Department's automated systems, requiring a sustained high level of speed and accuracy. The primary function of the Office Assistant III classification is office support including a variety of lead clerical activities related to filing, reception, form processing, record maintenance, mail, and data entry.

SUPERVISION EXERCISED AND RECEIVED

Incumbents in the Services Support Assistant III classification receive supervision from an Office Assistant Supervisor or other higher-level supervisor or manager. A Services Support Assistant III may provide lead direction to lower level staff.

TYPICAL DUTIES

Duties may include, but are not limited to, the following:

- Performs data entry transactions for case management, aid authorization, imaging and/or statistical data maintenance
- Operates a variety of operating systems, software, or related equipment to support a department's programs, services, and administrative functions
- As lead-worker, prioritizes and manages workload distribution; acts as technical resource on more difficult problems or specialized issues; monitors quality and timeliness of unit work; identifies and provides individual instruction to co-workers for work deficiencies; provides feedback to supervisor as requested

- Maintains files, writes or revises procedures and may generate reports and documents using system resources
- Reviews and reconciles system information (MEDS, C-IV, CWS/CMS, CMIPS, or other automated system); assesses and updates records; or takes corrective action or may direct others to take corrective action as appropriate
- Researches procedures, regulations, and/or technical materials as necessary
- Uses manuals, utilization guides, and All County Letters (ACL) System Change Requests (SCR), etc. to review upcoming changes to regulations, programs and systems to keep knowledge current
- Identifies the impacts of changes to automated systems and provides recommendations regarding changes; prepares information to inform users of changes or additions
- Troubleshoots problems with individual records, cases or participants by applying rules and regulations; provides information and interacts with case workers to correct issues or coordinates with the help desk to solve problems
- Coordinates with department supervisors and management in producing and maintaining files, information systems, and composing and creating reports
- Performs a variety of complex administrative, office support and para-professional functions
- Gathers data, conducts surveys, and prepares reports and develops training materials for system users; creates complex spreadsheets, report formats, forms, and record maintenance systems; may also prepare graphics for presentations and studies
- Responds to a variety of public, staff, and management inquiries, providing the requisite information, or referring the requests to supervisory and staff as appropriate
- Attends meetings and represents the department at meetings with other departments and agencies for information sharing, system improvements and implementation of changes
- Assists in special projects designated by the department management
- Performs related duties as assigned

EMPLOYMENT STANDARDS

Knowledge of:

- Personal computer operating systems, software, (MS Office, etc.) and related equipment
- Statewide automated systems (C-IV, MEDS, CWS/CMS, CMIPS, etc.)
- Department programs, functions and objectives
- Legislation, rules, regulations, policies and procedures related to multiple public assistance programs and related case administration techniques
- Work methods and techniques used by program staff
- Methods and techniques used in researching, proofing, evaluating, gathering, organizing, and arranging data

- Report writing and proper format and style
- Effective methods of training and presentations skills
- Record keeping and time-management practices and procedures
- Modern office practices and procedures
- Correct English usage, spelling, grammar, and punctuation
- Basic arithmetic

Ability to:

- Understand and carry out oral and written instructions
- Exercise sound and independent judgment in determining and selecting appropriate processes, alternatives, forms and desired actions within established work practices, procedures and commonly used regulations
- Learn and perform assigned tasks and routines
- Learn and develop skills with the more advanced and complex capabilities of computer software programs or automated systems
- Evaluate and interpret information using an automated system and troubleshoot identified problems
- Prepare a variety of reports, correspondence, documents, statistical data, graphs, and charts using a computer and software packages
- Provide training and assistance for others in using assigned systems or software
- Read and understand detailed and complicated instructions
- Understand, interpret and apply rules and regulations; determine the impact of regulations on local operations and systems
- Organize work schedules and budget time efficiently
- Work productively under time pressure and with interruptions
- Exercise tact when dealing with others
- Establish and maintain cooperative working relationships with those contacted in the course of work

MINIMUM QUALIFICATIONS (Education and/or Experience)

One (1) year experience performing duties of a Services Support Assistant II

OR

Three (3) years of full-time experience performing financial or statistical recordkeeping; or producing a variety of work products using a statewide automated system or software applications;

OR

Successful completion of thirty (30) college semester units or forty-five (45) quarter units from an accredited college or university

AND

Two (2) years of full time experience performing financial or statistical recordkeeping; or producing a variety of work products using a statewide automated system or software applications

DRIVER LICENSE REQUIREMENT:

Some positions in this classification may require possession of a valid California driver's License. Employees who drive on County business to carry out job-related duties must possess a valid California driver's license for the class of vehicle driven and meet automobile insurability requirements of the County. Eligibility for employment for those who do not meet this requirement due to disability will be reviewed on a case-by-case basis by the appointing authority.