BEFORE THE PERSONNEL APPEALS BOARD

STATE OF WASHINGTON

PATRICIA JACKOVONY et al., Appellants, v. DEPARTMENT OF SOCIAL AND HEALTH SERVICES, Respondent.	)	Case No. ALLO-03-0026 ORDER OF THE BOARD FOLLOWING HEARING ON EXCEPTIONS TO THE DETERMINATION OF THE DIRECTOR

Hearing on Exceptions. This appeal came on for hearing before the Personnel Appeals Board, WALTER T. HUBBARD, Chair; GERALD L. MORGEN, Vice Chair; and BUSSE NUTLEY, Member, on Appellants' exceptions to the Director's determination dated December 1, 2003. The hearing was held at the office of the Personnel Appeals Board in Olympia, Washington, on April 23, 2004.

Appearances. Appellants Patricia Jackvony, Debra Addington, Robert Scott, Susan Jackett, Deborah Merritt, Kevin Kuyper, and Patrick West were present and appeared *pro se*. No representative appeared on behalf of Respondent Department of Social and Health Services (DSHS).

Background. On July 29, 2003, Appellants submitted CQs requesting that their positions be reallocated from the class of Human Resource Consultant (HRC) 1 to Human Resource Consultant 2. Appellants work in the Central Personnel/Payroll Section within DSHS' Employee Services Division. The Central Personnel/Payroll section is divided into two parts, with one half staffed with human resource classes and the other half staffed with fiscal personnel. Each Appellant is responsible for ensuring that the approximately 1300 employees assigned to them receive their correct pay and benefits. To accomplish this, Appellants work with approximately 20 field representatives regarding these payroll issues.

Appellants were classified as Human Resource Consultant 1's, and their Classification Questionnaires (CQs), approved by both their supervisor and the department head, indicate that Appellants apply specialized knowledge to verify, audit, initiate, approve, correct and input all insurance, personnel and payroll source documents into the agency's automated personnel/payroll system. Appellants interpret and apply the Merit System Rules; DSHS, Department of Personnel, and Office of Financial management policies and procedures; Health Care Authority rules governing insurance eligibility; Family Medical Leave Act, Fair Labor Standards Act and union bargaining agreements. Acting in this consultative role to the field staff comprises 50 percent of Appellants' work time.

Twenty-percent of Appellants' work time is spent analyzing, negotiating and resolving complex issues and/or technical problems involving employee insurance benefits and processing insurance benefits for all eligible employees. Their remaining time is spent reviewing and processing all payroll activity and mandatory/voluntary deductions and consulting with field staff regarding correct payroll procedures, verifying employee eligibility for holidays and leave usage and auditing accruals, leave usage and adjustment to ensure compliance with rules and regulations.

On August 5, 2003, their reallocation request to the HRC 2 position was denied, and they were informed their positions were properly allocated to the HRC 1 classification. Appellants requested a review from the Department of Personnel. On October 13, 2003, Paul Peterson,

Personnel Officer, conducted a review of Appellants' positions. On December 1, 2003, Mr. Peterson issued his decision concluding that the Appellants should be reallocated to the class of Fiscal Technician. On December 22, 2003, Appellants filed exceptions to the director's determination with the Personnel Appeals Board.

Appellants take exception to the determination that they spend 100 percent of their work time processing payroll documents. Appellants assert that their duties are within the Human Resource Consultant series because they perform professional level human resource work. Appellants assert that the work they perform is complex rather than routine, including consultation with human resource personnel staff in the field regarding laws, rules and policies. Appellants assert they provide field staff with consultation regarding personnel and attendance. Therefore, Appellants argue they should be classified to the HRC 2 level.

Primary Issue. Whether the director's determination that Appellant's position is properly allocated to the Fiscal Technician classification should be affirmed.

Relevant Classifications. Fiscal Technician, class code 12030, Human Resource Consultant 1, class code 19102, and Human Resource Consultant 2, class code 19103.

Decision of the Board. The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. Also, a position review is not a comparison of work performed by employees in similar positions. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the

class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Position allocations are "based upon an investigation of duties and responsibilities assigned and/or performed and other information and recommendations." (WAC 356-20-200). Because a current and accurate description of a position's duties and responsibilities is documented in an approved classification questionnaire, the classification questionnaire becomes the basis for allocation of a position. An allocation determination must be based on the overall duties and responsibilities, as documented in the CQ.

The Department of Personnel designee concluded that Appellants performed fiscal duties 100 percent of their time and allocated them to the Fiscal Technical classification, which is defined as follows:

> Performs a variety of manual or automated fiscal record keeping tasks. Processes, balances and enters financial source documents which include travel vouchers, field orders, invoice vouchers, and or/payroll documents. These functions involved calculating and applying simple cost allocations.

After reviewing Appellants' CQs, we disagree that the Fiscal Technical classification is the appropriate allocating class here. While Appellants perform some duties that may be considered fiscal in nature, such as processing payroll and mandatory/voluntary deductions on employees' pay, this duty only comprises 15 percent of their time.

At the HRC 1 level, the incumbent performs routine professional resource duties under close supervision. The distinguishing characteristics, in pertinent part, indicates that at the HRC 1 level, the supervisor typically reviews work in progress as well as outcomes, provides advice or direction regarding work procedures and assist with work prioritization. The distinguishing characteristics

also indicate that the employee may have a specific assignment that is mostly routine and of limited scope.

At the HRC 2 level, incumbents consult with and provide assistance to managers and employees regarding a variety of human resource issues. These duties are performed under general guidance of a higher-level human resource professional. The work of the HRC 2 is complex, but the impact of decision is generally limited and assignments normally involve making decisions and judgments within established precedents.

The approved CQ here supports that Appellants spend the majority of their work time performing professional human resource duties, which includes providing advice regarding complex personnel and payroll issues to human resource staff and employees in DSHS field offices. This includes expert-level guidance and advice regarding complex issues, including payroll benefits related to retirement, medical insurance, computation of payroll adjustments, all necessary deductions of annual leave cash outs, sick leave on VEBA enrollments and attendance verification and auditing. Appellants' work is complex in nature but does not have broad potential impact, and the decisions they make are within established precedents. The Appellants have met their burden of proving that their positions should be allocated to the Human Resource Consultant 2 level, and their appeal should be granted.

Appellants have established that the work they perform meets the definition and the distinguishing characteristics necessary to be allocated to the Human Resource Consultant 2 classification.

Conclusion. The appeal on exceptions by Appellants should be granted, the Director's determination reversed, and Appellants' positions should be reallocated to the class of Human Resource Consultant 2.

ORDER

NOW, THEREFORE, IT IS HEREBY ORDERED that the Appellants' appeal is granted, the Director's determination is reversed, and Appellants' positions are reallocated to the class of Human Resource Consultant 2.

DATED this _____ day of _____, 2004.

WASHINGTON STATE PERSONNEL APPEALS BOARD

_____
Walter T. Hubbard, Chair

_____
Gerald L. Morgen, Vice Chair

_____
Busse Nutley, Member