BEFORE THE PERSONNEL APPEALS BOARD

STATE OF WASHINGTON

CAROLYN WILSEY ET AL., Appellants, v. DEPARTMENT OF SOCIAL AND HEALTH SERVICES, Respondent.	Case No. ALLO-05-0013 FINDINGS OF FACT, CONCLUSIONS OF LAW AND ORDER OF THE BOARD

I. INTRODUCTION

Hearing on Exceptions. Pursuant to RCW 41.64.060 and WAC 358-01-040, this appeal came on for hearing before the Personnel Appeals Board, WALTER T. HUBBARD, Chair, on Appellants' exceptions to the director's determination dated August 3, 2005. The hearing was held at the office of the Personnel Appeals Board in Olympia, Washington, on February 15, 2006. GERALD L. MORGEN, Member, listened to the recorded proceedings, reviewed the file and exhibits and participated in this decision.

Appearances. Appellants Carolyn Wilsey and Rebecca Gardner were present and were represented by Julie Sakahara of the Washington Federation of State Employees. Lloyd Hoage, Human Resources Consultant, represented Respondent Department of Social and Health Services (DSHS).

Background. Appellants submitted Classification Questionnaires (CQs) to DSHS Human Resources in April 2004, requesting that their Office Assistant Senior (OAS) positions be reallocated to Customer Services Specialist (CSS) 2 positions. Human Resource Consultant Tess Sample reviewed Ms. Wilsey's CQ for position number KJ06 and Ms. Gardner's CQ for position

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number F806. In addition, Ms. Sample conducted a desk audit with each employee on May 3, 2004.

By letter dated April 6, 2005, Ms Sample notified the Appellants that their positions were properly allocated to the Office Assistant Senior classification. Although Ms. Sample believed some of Appellants' duties could apply to the Customer Service Specialist 2 classification, she concluded that Appellants did not interpret policies and procedures. Ms. Sample further noted that Appellants' supervisors disagreed with their statements on the CQs. In addition, the Customer Services Specialist 2 definition required incumbents to be in a designated customer service program, and Ms. Sample determined Appellants' positions were assigned to the clerical unit within the Developmental Disabilities Field Services Office.

Appellants appealed Ms. Sample's decision to the Department of Personnel, and on July 27, 2005, Paul L. Peterson, Personnel Hearings Officer, held an allocation review. By letter dated August 3, 2005, Mr. Peterson informed Appellants that their positions did not meet the criteria for the Customer Services Specialist 2 classification because they did not work within a designated customer service program.

Summary of Appellants' Argument. Appellants assert that while they are technically assigned to a clerical section within the Developmental Disabilities Division, their duties have changed over time and reflect a customer service role. Appellants contend the Developmental Disabilities Division is a program within DSHS and assert they primarily work with customers regarding contract issues and navigate them through division processes. Appellants assert Ms. Sample acknowledged a majority of their duties fell within the scope of customer service but based her decision on the fact Appellants drew a blank when asked about specific policies during the desk audits. Appellants further assert there are Customer Service Specialist 2 positions in the same

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region performing similar duties. Therefore, Appellants argue their positions are unfairly and incorrectly allocated to the Office Assistant Senior classification.

Summary of Respondent's Argument. Respondent asserts Appellants' positions have not been designated to a customer service program, as the Customer Service Specialist (CSS) 2 definition requires. Respondent argues DSHS has designated only Community Service Offices (CSOs) as customer service programs and contends Appellants' positions are assigned to a clerical unit within the Division of Developmental Disabilities. Respondent contends Appellants primarily perform the clerical portion of processing contracts and explain processes when case managers are unavailable. Respondent acknowledges that some of the duties identified on Appellants' CQs, such as maintaining filing systems and logs, office and telephone reception, and mailings, are also recognized as clerical support duties in the CSS 2 classification; however, Respondent asserts the clerical duties performed by CSS 2 positions differ because they are "incidental" to the overall work assignment. Respondent contends Appellants' positions perform those clerical duties a majority of the time, as indicated by their CQs. Therefore, Respondent argues Appellants' positions are properly allocated to the Office Assistant Senior classification.

Primary Issue. Whether the director's determination that Appellants' positions are properly allocated to the Office Assistant Senior classification should be affirmed.

Relevant Classifications. Office Assistant Senior, class code 01011; Customer Service Representative 2, class code 09440.

The definition of an Office Assistant Senior states, "[p]erforms a variety of complex clerical duties." The distinguishing characteristics note that an Office Assistant Senior independently performs assignments that are complex in nature, including record keeping systems and data base

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files, as well as responding to inquiries that deal with policies and procedures and evaluating applications and requests for information.

The definition for a Customer Service Specialist 2 states the following:

> In a designated customer service program, responsible for resolving complaints, inquiries and customer service problem from clients, customers, general public, State and Federal agencies. Interprets agency-related laws, policies and procedures. Advises clients and customers of proper procedures to access agency services.

The distinguishing characteristics for a Customer Service Specialist 2 state that "[c]lerical support duties are incidental to the total work assignment." Customer Service Specialist 2 positions are also "responsible for resolution of complaints, inquiries and customer service problems" and "do not routinely process actions to others in the agency for resolution."

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

Appellants are assigned to the Clerical Division within the Division of Developmental Disabilities, Region 4 Field Services. While some of their duties may include aspects of customer service, the Customer Services Specialist 2 class specification clearly defines the position as one in a designated customer service program. In addition, Appellants' CQs indicate the majority of their duties

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include maintaining filing systems and logs, updating computer or manual data systems, performing office and telephone reception, completing office forms, compiling and completing recurrent reports, performing routine typing, copying work, and preparing mailings. Appellants also route and track paperwork to case managers, who are then responsible for handling the more complex contract issues. The majority of Appellants' duties, as reflected on their CQs, are clerical in nature. Therefore, Appellants' position numbers KJ06 and F806 are appropriately allocated to the Office Assistant Senior classification.

Conclusion. The appeal on exceptions by Appellants should be denied, and the Director's determination dated August 3, 2005, should be affirmed and adopted.

V. ORDER

NOW, THEREFORE, IT IS HEREBY ORDERED that the appeal on exceptions by Carolyn Wilsey and Rebecca Gardner is denied.

DATED this _____ day of _____, 2006.

WASHINGTON STATE PERSONNEL APPEALS BOARD

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Walter T. Hubbard, Chair

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Gerald L. Morgen, Member

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