BEFORE THE PERSONNEL RESOURCES BOARD

STATE OF WASHINGTON

DEPARTMENT OF CORRECTIONS Appellant vs. DARIN DILLING, Respondent.	)	CASE NO. R-ALLO-17-003 ORDER OF THE BOARD FOLLOWING HEARING ON EXCEPTIONS TO THE DETERMINATION OF THE DIRECTOR

Hearing on Exceptions. This appeal came before the Personnel Resources Board, SUSAN MILLER, Vice Chair; and VICKY BOWDISH, Member, for a hearing on Appellant's exceptions to the director's determination dated December 21, 2016. The hearing was held on June 14, 2017, in Room 110 of Capitol Court, Olympia WA.

Appearances. Appellant Department of Corrections (DOC) was present and represented by Mindy Portschy, Senior Human Resource Consultant. Respondent Darin Dilling was present by telephone and represented himself.

Background. On February 26, 2016, Respondent submitted a Position Review Request (PRR) to DOC's Human Resources (HR) Office requesting reallocation from Office Assistant (OA) 3 to Patient Services (PS) Coordinator.

By letter dated May 9, 2016, Appellant notified Respondent that his position remained allocated to an OA 3.

On June 7, 2016, Respondent submitted a request to OFM State HR requesting a written Director's review of DOC's allocation determination, contending his position should be reallocated to PS Representative or PS Coordinator.

By letter dated December 21, 2016, the Director's Review Specialist notified Respondent that his position should be reallocated to PS Representative.

On January 20, 2017, the PRB received Appellant DOC's Appeal Request. In their request, Appellant took exception to the Director's Review Determination.

Respondent serves in the Health Services Unit at Airway Heights Correctional Center (AHCC). The duties assigned his position entail providing a variety of services, including scheduling offender medical appointments; providing clerical support to the Minimum Security Unit (MSU) Medical Clinic; and managing patient health records.

The review period for this allocation request was twelve (12) months prior to February 26, 2016.

Summary of Appellant's Arguments.

Appellant DOC contends the majority of Respondent's work incorporates the definition and distinguishing characteristics (DCs) of the OA 3 class specification. Appellant further contends the majority of Respondent's work is clerical in nature, per the Glossary of Classification Terms, and therefore best fits the class series concept for the Office Assistant Series.

Appellant asserts that according to the PRR, Respondent spends at least 60% of his time providing clerical support for the MSU Medical Clinic, managing patient health records, and performing various miscellaneous clerical tasks. Appellant points out that only 40% of the duties listed on Respondent's PRR entail patient scheduling. Appellant acknowledged the work Respondent performs is valuable to DOC and does not minimize his contribution to the Health Services Department.

Summary of Respondent's Arguments.

Respondent believes the Director's Review Specialist was accurate in reallocating his position to a PS Representative. Respondent asserts DOC's emphasis on clerical work is untrue and further asserts the clerical work he does perform is often around offender patient scheduling.

Respondent's supervisor, Vicky Hall, Secretary Supervisor, explained how Respondent's work involves patient scheduling via the OMNI Scheduling System. OMNI produces reports that inform Respondent on who needs appointments with health care providers. Ms. Hall further states that no-shows, cancellations, and other anomalies are entered into the OMNI system by the provider, which flags the offender patients in need of future scheduling. Respondent takes action on these entries in OMNI and reschedules offender appointments. As such, Ms. Hall states that Respondent relies on OMNI reports to determine who needs services within the Communicable Disease, Infection Prevention and Immunization Program and schedules appointments for the offenders, rather than the offenders requesting appointments from him.

Primary Issue. Whether the director's determination should be affirmed and whether Respondent should remain allocated to the Patient Services Representative classification.

Relevant Classifications. Office Assistant 3; Patient Services Representative; Patient Services Coordinator.

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. 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. See *Liddle-Stamper v. Washington State University*, PAB Case No. 3722-A2 (1994).

In *Norton-Nader v. Western Washington University*, PRB Case No. R-ALLO-08-020 (2008), the Personnel Resources Board (Board) stated the following standards are the hierarchy of primary considerations in allocating positions:

a) Category concept (if one exists).

b) Definition or basic function of the class.

c) Distinguishing characteristics of a class.

d) Class series concept, definition/basic function, and distinguishing characteristics of other classes in the series in question.

Office Assistant Class Series Concept

Performs a variety of clerical duties in support of office or unit operations.

Class Series Concept for Patient Services Representative and Patient Services Coordinator

Coordinates and provides patient support services such as scheduling appointments, answering telephones, receiving patients, registering patients, and processing patient charge documents in a patient care area.

Respondent runs reports from the OMNI Health Services Scheduling System to gather information regarding which offenders need services in the Communicable Disease, Infection Prevention and Immunization Program. Part of his duties within this program include scheduling various clinics; providing support services for nurses and a physician; and scheduling interpreter services for non-English speaking patients. Respondent's PRR indicates that 40% of his time entails work in these areas.

Respondent's PRR indicates that approximately 30% of his time entails providing support services for the Minimum Security Unit (MSU) Medical Clinic, including such work as assisting with MSU transfers and releases. 20% of Respondent's PRR speaks to managing health records

and document management and 10% specifies processing and routing mail, maintaining a desk manual and other clerical tasks. This means that 60% of Respondent's PRR is clerical in nature. Additionally, the PRR's 40% scheduling of appointments does not involve any patient contact, not even through kites. Rather, Respondent relies on OMNI reports to schedule patients for clinics/immunizations in keeping with medical policy requirements within the Communicable Disease, Infection Prevention, and Immunization Program.

The nature of work performed by Respondent's position is more supportive in nature rather than patient related. Based on the majority work, the duties of Respondent's position are consistent with the class series concept for the Office Assistant. Nonetheless, the Board looked next at the definitions of the OA 3, PS Representative and PS Coordinator.

Office Assistant 3

Definition

> Under general supervision, independently perform a variety of complex clerical projects and assignments such as preparing reports, preparing, reviewing, verifying and processing fiscal documents and/or financial records, composing correspondence such as transmittals and responses to frequent requests for information, establishing manual or electronic recordkeeping/filing systems and/or data base files, and responding to inquiries requiring substantive knowledge of office/departmental policies and procedures. Positions may perform specialized complex word processing tasks in a word processing unit or complex rapid data inquiry and/or entry functions.

Patient Services Representative

Definition

> Provides support services in a patient care area such as scheduling patient appointments, triaging patient telephone calls to medical staff, registering patients,

providing point-of-service admission, maintaining patient records and assembling patient charts, initiating and processing patient charge documents, and transcribing physicians' orders.

Patient Services Coordinator

Definition

Solely coordinates the daily patient flow in patient care areas and provides support services such as triaging patient telephone calls to medical staff, scheduling appointments, registering patients, maintaining patient records and assembling patient charts, and initiating and processing patient charge documents.

Respondent's PRR indicates 60% of his time entails providing support services to a nurse and Assistant Registered Nurse Practononer (ARNP); pulling, preparing and delivering health records in conjunction with patient appointments; triaging and maintaining health records; and performing various other clerical work, such as processing and routing mail. The focus of Respondent's position does not appear to have an emphasis on patient services, rather on clerical/supportive services. The Glossary of Classification Terms defines "clerical" as, "Work that supports office operations."

Respondent spoke to his level of complexity. The level of complexity does not define the job classification, rather the job class is determined by the majority of duties performed. Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the **majority of the position's duties and responsibilities.** (emphasis added) See *Dudley v. Dept. of Labor and Industries*, PRB Case No. R-ALLO-07-007 (2007).

The varied work performed by Respondent fits the OA 3 job class, as the majority of Respondent's assigned work is not to "provide[s] support services in a patient care area such as scheduling patient appointments, triaging patient telephone calls to medical staff, registering patients, providing point-of-service admission, maintaining patient records and assembling patient charts, initiating and processing patient charge documents, and transcribing physicians' orders." While some of his work fits the definition of PS Representative, the Board must look at the majority of work. Since the majority of his duties do not fit the PS Representative, the majority of his work also does not fit the PS Coordinator, which is a level higher in the series.

In a hearing on exceptions, the appellant has the burden of proof. WAC 357-52-110. Appellant has met their burden of proof.

ORDER

NOW, THEREFORE, IT IS HEREBY ORDERED that the appeal on exceptions by DEPARTMENT OF CORRECTIONS is granted and the director's determination dated December 21, 2016, is overturned. Respondent remains allocated to Office Assistant 3.

DATED this _____ day of _____, 2017.

WASHINGTON PERSONNEL RESOURCES BOARD

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SUSAN MILLER, Vice Chair

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VICKY BOWDISH, Member