

CIVIL SERVICE COMMISSION

CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

Sent via Electronic Mail

January 22, 2014

NOTICE OF CIVIL SERVICE COMMISSION MEETING

SCOTT R. HELDFOND
PRESIDENT

E. DENNIS NORMANDY
VICE PRESIDENT

DOUGLAS S. CHAN
COMMISSIONER

KATE FAVETTI
COMMISSIONER

GINA M. ROCCANOVA
COMMISSIONER

IFER C. JOHNSTON
EXECUTIVE OFFICER

David Canham
SEIU Local 1021
350 Rhode Island Street, 100 South
San Francisco, CA 94103
David.Canham@seiu1021.org

SUBJECT: CLASS 2903 ELIGIBILITY WORKER ISSUES RAISED AT THE CIVIL SERVICE COMMISSION MEETING OF FEBRUARY 4, 2013.

Dear Mr. Canham:

The above matter will be considered by the Civil Service Commission ("Commission") at a meeting to be held on **February 3, 2014 at 5 p.m.** (as you have requested) in Room 400, Fourth Floor, City Hall, 1 Dr. Carlton B. Goodlett Place.

The agenda will be posted for your review on the Commission's website at www.sfgov.org/Civil_Service under "Meeting Materials" no later than end of day on Wednesday, January 29, 2014. Please refer to the attached Notice for procedural and other information about Commission hearings. I emailed you a copy of the Department of Human Resources' staff report on December 6, 2013; however, a hard copy is also available for your review at the Civil Service Commission's office located at 25 Van Ness Avenue, Suite 720, San Francisco.

To date, we have not received a response or any materials on the 2903 Eligibility Worker classification issues from SEIU, Local 1021 (other than that which was submitted with SEIU, Local 1021's original appeal on the 2903 Eligibility Worker job announcement dated October 4, 2012). As I indicated in my December 6th email to you, in the event that SEIU, Local 1021 wishes to submit a response or any other materials on the matter, **the deadline for receipt in the Commission office is 5:00 p.m. on Friday, January 24, 2014** (as a reminder, we require an original and nine copies of any supplemental materials you wish to submit—all double-sided, hole-punched, paper-clipped and numbered) (you will note that I have extended the deadline to this Friday to provide you with more time). Please be sure to redact SEIU, Local 1021's submission for any confidential or sensitive information that is not relevant to the issues (e.g., home addresses, home or cellular phone numbers, social security numbers, dates of birth, etc.), as it will be considered a public document.

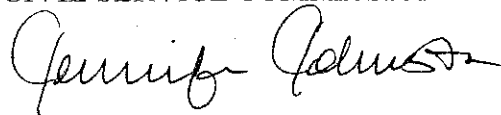
THIS DOCUMENT SUPPORTS
CALENDAR ITEM 14

All non-privileged materials being considered by the Civil Service Commission for this item will be available for public inspection and copying at the Civil Service Commission office Monday through Friday from 8:00 a.m. to 5:00 p.m. (beginning next Wednesday, January 29, 2014).

Attendance by you or an authorized representative of SEIU, Local 1021 is recommended. All calendared items will be heard and resolved at this time unless good reasons are presented for a continuance. A representative from SEIU, Local 1021 and the department will each have five (5) minutes to present the matter. **As I have indicated, public comment will be limited to one (1) minute per person to ensure that all individuals have an opportunity to address the issue and to ensure that we are able to maintain a quorum throughout the proceeding.**

You may contact me at (415) 252-3247 or at Jennifer.Johnston@sfgov.org if you have any questions.

CIVIL SERVICE COMMISSION



JENNIFER JOHNSTON
Executive Officer

Attachment

Cc: Micki Callahan, Department of Human Resources
Donna Kotake, Department of Human Resources
Martin Gran, Department of Human Resources
Steve Ponder, Department of Human Resources
Ron Weigelt, Department of Public Health
Luenna Kim, Human Services Agency
Sin Yee Poon
Commission File
Commissioners' Binder
Chron

Edwin M. Lee
Mayor



Micki Callahan
Human Resources Director

Via E-mail and U.S. Mail

January 15, 2014

Jennifer Johnston
Executive Officer
Civil Service Commission
25 Van Ness, Suite 720
San Francisco, CA 94103

CIVIL SERVICE COMMISSION	
REGISTER	0009.14.2
NUMBER	

RE: SEIU 2903
JJ

2014 JAN 21 PM 1:25
EXECUTIVE OFFICER
CIVIL SERVICE COMMISSION
SAN FRANCISCO

RE: 2903 Eligibility Classification and Compensation Issues

Dear Ms. Johnston:

We have met internally to review the issues raised by SEIU regarding the above, and it is clear that the dispute ultimately centers around wages of affected employees, an issue that is beyond the purview of the Commission. It is the City's intention to make proposals in our upcoming negotiations to address these issues, which we believe would make any hearing or action by the Commission in February premature. In fact, we are concerned that holding a hearing prior to the conclusion of negotiations would be disruptive to the negotiations process. Moreover, we remind you that there is no pending matter before the Commission.

For these reasons, DHR will be deferring this item until after SEIU's MOU is submitted to the Board of Supervisors later this fiscal year. By copy of this letter, we are also notifying SEIU that DHR is deferring this item until after negotiations conclude.

We are confident that the natural give-and-take of the negotiations process, aided by a mediator/arbitrator as necessary, will resolve the central issues separating the parties. To the extent that any classification actions are implicated, those would be taken to the Commission as necessary (and subject to appeal where appropriate) after the conclusion of negotiations.

We will continue to keep you advised of the parties' progress.

Sincerely,

Micki Callahan
Human Resources Director

cc: David Canham, SEIU Local 1021

Johnston, Jennifer

From: David Canham <david.canham@seiu1021.org>
Sent: Thursday, January 16, 2014 2:50 PM
To: Johnston, Jennifer
Subject: Eligibility worker hearing.

Jennifer I have seen the letter from Martin Gran regarding deferring the item until after bargaining. I have discussed this with members at HSA. The union would like you to still hold the hearing in February.

Sent from my iPhone

STAFF REPORT



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

CIVIL SERVICE COMMISSION REPORT TRANSMITTAL (FORM 22)

Refer to Civil Service Commission Procedure for Staff - Submission of
Written Reports for Instructions on Completing and Processing this Form

1. Civil Service Commission Register Number: _____ - _____ - _____
2. For Civil Service Commission Meeting of: December 16, 2013
3. Check One: Ratification Agenda
 Consent Agenda
 √ Regular Agenda
 Human Resources Director's Report
4. Subject: Report by the Department of Human Resources regarding the issues related to class
2903 Eligibility Worker Raised at the Civil Service Commission Meeting of February 4, 2013.
5. Recommendation: Accept the Report
6. Report prepared by: Martin Gran Telephone number: 415-557-4857
7. Notifications: (Attach a list of the person(s) to be notified in the format described in
 IV. Commission Report Format -A).
8. Reviewed and approved for Civil Service Commission Agenda:

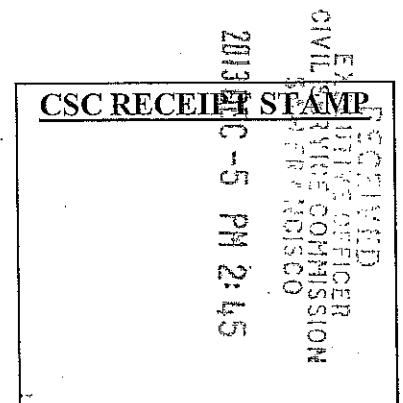
Human Resources Director: *W. J. Allen*

Date: 12/5/13
9. Submit the original time-stamped copy of this form and person(s) to be notified
(see Item 7 above) along with the required copies of the report to:

**Executive Officer
Civil Service Commission
25 Van Ness Avenue, Suite 720
San Francisco, CA 94102**

10. Receipt-stamp this form in the ACSC RECEIPT STAMP box to the right using the time-stamp in the CSC Office.

Attachment



NOTIFICATIONS -

Martin Gran
Employee Relations Director
Department of Human Resources
One South Van Ness, 4th floor
San Francisco, CA 94103

Donna Kotake
Workforce Development Director
Department of Human Resources
One South Van Ness, 4th floor
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Luenna Kim
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Human Services Agency
1650 Mission Street, 2nd floor
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Michael Brown
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Acting San Francisco Field Director
SEIU 1021
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San Francisco, CA 94103

Sin Yee Poon
SEIU 1021
350 Rhode Island Street, Ste. 100 South
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Edwin M. Lee
Mayor

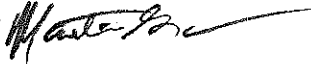
Micki Callahan
Human Resources Director

MEMORANDUM

DATE: December 5, 2013

TO: The Honorable Civil Service Commission

THROUGH: Micki Callahan, Human Resources Director 

FROM: Martin Gran, Employee Relations Director 

SUBJECT: Report by the Department of Human Resources regarding the issues related to class 2903 Eligibility Worker raised at the Civil Service Commission Meeting of February 4, 2013.

Introduction

At its meeting on February 4, 2013, the Civil Service Commission ("CSC" or "Commission") denied an October 4, 2012 appeal filed by SEIU Local 1021 ("SEIU" or "Union") on behalf of incumbents serving as 2903 Eligibility Workers and 2905 Senior Eligibility Workers. The Commission further directed the Executive Officer and the Human Resources Director to: (a) meet with SEIU to discuss the classification concerns that SEIU raised; and (b) provide a report clarifying the issues and identifying any avenues for resolution within the jurisdiction of the Civil Service Commission.

The crux of the Union's complaint is that the City suspended the flexible staffing program that, pursuant to CSC Rules, the City has discretion to apply to positions on an announcement-by-announcement basis.

Background

The Human Services Agency ("HSA") and the Department of Public Health ("DPH") both employ individuals in the 2903 Eligibility Worker classification. The 2903s at HSA work under general supervision and perform a variety of duties in order to make eligibility determinations for public assistance in a variety of human service programs. (See Attachment 1.) The 2903s at DPH work at various public health facilities under general supervision and perform a variety of eligibility and related clerical and administrative duties. (See Attachment 1.)

The 2905 Senior Eligibility Workers at HSA are responsible for implementing defined rules and regulations pertaining to various categorical aid programs and explaining them to applicants and the general public. The 2905s regularly meet with clients, relatives, representatives of outside agencies and the public. The 2905s perform the full range of assigned duties of their classification and receive only occasional instruction or assistance as new or unusual situations arise.

A flexible staffing program allows permanent civil service employees who have passed the probationary period and meet the criteria established on the job announcement for specific class(es) to promote to higher level classes within an occupational series by methods other than traditional selection procedures. It reduces exam needs and facilitates promotive opportunities to employees.

However, "flexing" will be permitted only where there is a demonstrated Departmental need and where the Department has a budgeted position. Historically, a promotion to a higher level class is not automatic, but at the discretion of the Appointing Officer. In filling a vacancy, the employing Department has the discretion to utilize either flexible staffing or open recruitment.

Unlike HSA, DPH does not employ the 2905 Senior Eligibility Worker classification, and it has never elected to use flexible staffing for this series. HSA does employ both classifications, and has, at various times, flexibly staffed these classifications. However, after 2009, flexible staffing was not included in the 2903 job announcements. (This was also true for earlier job announcements at HSA.)

Specifically, this is a classification series which, under Civil Service Rule 111.16, management could elect to flexibly staff under certain conditions. However, SEIU: (a) asserted that the most recent 2903 job announcement deviated from its job specification, and, therefore, violated Civil Service Rule 109.6; and (b) requested that HSA rescind and revise the 2903 job announcement at issue. SEIU also requested that the Civil Service Commission take appropriate action to remedy any situations whereby City departments use 2903 Eligibility Workers to perform the work of 2905 Senior Eligibility Workers.

On October 4, 2012, SEIU submitted an appeal to the Civil Service Commission on behalf of incumbents serving as 2903 Eligibility Workers and 2905 Senior Eligibility Workers. SEIU asserted that the job announcement for 2903 Eligibility Worker "deviate[d] from the official class specification," thereby making it indistinguishable from an announcement for 2905 Senior Eligibility Worker.

However, at the February 4, 2013 Civil Service Commission meeting, the Civil Service Commission denied SEIU's appeal of 2903 Eligibility Worker announcement. (See Attachment 2.)

SEIU has brought related claims in past. In 2010, SEIU filed a grievance alleging an MOU violation claiming HSA "unilaterally ended the practice of automatically promoting employees in Class 2903 Eligibility Workers to Class 2905 Senior Eligibility Workers after they had served one year in Class 2903." The City denied the grievance on the grounds that HSA was "not obligated to automatically promote Class 2903 Eligibility Workers to Class 2905 Senior Eligibility Workers, nor is that matter grievable under the [Collective Bargaining Agreement]." SEIU appealed the grievance to arbitration and the Deputy City Attorney declined to arbitrate on the grounds that the subject matter falls within the Civil Service Commission's jurisdiction. SEIU neither filed a complaint with the Commission nor moved to compel arbitration in court.

While the Commission denied SEIU's appeal, the Commission directed the Executive Officer and the Human Resources Director to meet with SEIU to discuss the classification concerns that SEIU had raised and to report back to the Commission. The Executive Officer met with SEIU in early March 2013 in order to better define SEIU's issues and concerns. While SEIU declined to meet with DHR, the union agreed to provide a comprehensive, formal statement of its concerns to the Department of Human Resources ("DHR") via email.

The Employee Relations Director, at the direction of the Human Resources Director, agreed to accept SEIU's electronic submission. DHR has reviewed and considered SEIU's concerns and has summarized them in this report. (Attachment 3.)

Relevant Rules, Adviser, Policies, Procedures, and MOU sections

CSC Rule 111.16 Authorization for Flexible Staffing Program

The Human Resources Director is authorized to establish flexible staffing programs to promote permanent civil service employees past the probationary period to higher classes within an occupational series or to another series by methods other than traditional selection procedures. In establishing a flexible staffing program, the Human Resources Director shall consider, among other factors, length of permanent service, performance appraisal ratings, availability of positions, budgetary restrictions, and equal employment opportunity. The specific procedures and qualifications established shall be listed in the flexible staffing examination announcement for the class(es) involved.

CSC Rule 109.16.2 Temporary Out-of-Class Assignments

109.16.1 In accordance with this Rule, an appointing officer may exercise Charter authority to assign an employee to perform any of the duties of the department to which appointed and to make any temporary out-of-class assignment to maintain the provision of any public service.

109.16.2 Temporary out-of-class assignment means the assignment of an employee without change in class to perform the normal day-to-day duties and responsibilities of another classification. Records of such temporary out-of-class assignment shall be placed in the employee's personnel file. An employee assigned to temporary out-of-class assignment may also request that the appointing officer/designee place the record in the employee's personnel file contemporaneous with the assignment. The record of temporary out-of-class assignments must be verified and approved by the appointing officer/designee prior to placement in the personnel file. The Human Resources Director shall be responsible for administering and making effective the provisions of this Rule, and establishing such administrative controls and procedures as may be necessary. The decision of the Human Resources Director shall be subject to appeal to the Civil Service Commission.

- 1) Temporary out-of-class assignment is distinguished from "temporary appointment" in that the latter refers to an appointment to a differently classified position in accordance with civil service appointment provisions and in accordance with budgetary requirements.
- 2) Temporary out-of-class assignment is distinguished from a short term or regular assignment of a minor portion of work duties which are allocated to a different class, but which are generally related to the regular duties or level of responsibility of the employee's current class.
- 3) The Human Resources Director shall be responsible for administering and making effective the provisions of this Rule, and establishing such administrative controls and procedures as may be necessary.
- 4) Temporary out-of-class assignments shall not be made when an appointment based on the regularly established Rules and procedures of the Civil Service Commission may be made. Temporary out-of-class assignments may be approved while an appointment through the established procedures is pending.
- 5) When a temporary out-of-class assignment is in order, selection and retention shall be at the discretion of the appointing officer or designee.

Civil Service Adviser No. 009-2000 – Out-of-Class Assignment

The Civil Service Commission establishes the definition and policy on temporary out-of-class assignments. The Department Head/Designee may make a temporary out-of-class assignment

to maintain the provision of any public service. This means the assignment of an employee without change in class to perform the day-to-day duties and responsibilities of another class.

SEIU Memorandum of Understanding – Out-of-Class/Acting Assignment

¶320. An employee assigned in writing by the Department Head to perform a substantial portion of the duties and responsibilities of a higher classification shall be entitled to out of class pay after the tenth (10th) work day (within a sixty (60) working-day period) of such an assignment, retroactive to the first (1st) day of the assignment.

¶321. Employees who believe they have been assigned to do the work of a higher classification, whether in writing or not, and do not receive such pay must file an out of class pay claim with the Department Head within forty-five (45) working days of such alleged assignment.

Issues

On May 16, 2013, SEIU posed the following clarifying questions to DHR claiming that the City is misusing HSA classifications 2903 and 2905:

- (A) In 2009, during the economic and budget crisis, HSA unilaterally suspended the flexing up in the flexible staffing series classes, and the Union was not notified of management's decision. Has the City indeed implemented a unilateral change when it suspended the flexible staffing program? And, if so, has the Union been notified of this change?
- (B) The lower classification (e.g., 2903s) was reported as being assigned the full range of work performed by the upper classification (e.g., 2905s). Is it the position of the City that Departments can make assignments without regard to the official job specifications of the classification of the employee, specifically in relation to the Eligibility Workers series (e.g., 2903 and 2905)? Has DHR established "administrative controls and procedures" to "administer and make effective" the provisions of the Temporary Out-of-Class Assignment Rule? And, if so, why have these "controls and procedures" not been utilized to halt the permanent out-of-class assignments of the lower flex incumbents at HSA, Child Support Services ("CSS"), and possibly other Departments?

Issue A

The Union claims there was a unilateral change during the economic and budget crisis; HSA suspended "the flexing up in the flexible staffing series class[ification]"; and Union was not notified of management's unilateral decision.

In reply, the Human Resources Director exercised the discretion allowed under the Rules to determine whether the 2009 job posting for 2903 should include provisions to allow automatic "flexing up" to the 2905 class. Several factors led to the decision not to provide for automatic upgrades. First, the City's budget crisis required austerity in hiring and promotions, a mandate that is inconsistent with automatic promotion. The City projected a \$229 million General Fund shortfall for FY 2008-09, and thereafter, a \$575.6 million shortfall for FY 2009-10 as well as projected budget deficits for those years. At the same time, the City experienced an imbalance of sources and uses due to a variety of reasons, including, but not limited to, voter-approved mandated spending requirements (e.g., Propositions), loss of one-time sources, and decreased funds from the State. Second,

Departments across the City discontinued filling higher-level positions in order to conserve funds. HSA was no exception.

At the beginning of fiscal year 2008-2009, the Controller's Services Auditor Division ("CSA") conducted a variety of studies to improve efficiency and effectiveness of City operations. CSA is charged via Charter – Proposition C (2003) - to conduct such analyses. At the end of 2008, the Mayor's then-Budget Director projected an unprecedented \$575.6 million shortfall for FY 2009-2010. Based on the projected FY 2009-2010 deficit, the Mayor's then-Budget Director provided Budget Instructions on December 11, 2008 to Department Heads to continue to seek and prioritize solutions to help reduce the shortfall, including but not limited to, administrative efficiencies, consolidation of programs and functions, restructuring service delivery and revenue options.

Accordingly, the Mayor asked HSA to cut \$21.7M or 25% in General Fund support from HSA's \$86.8M discretionary General Fund, which resulted in 12.5% in on-going target reductions and 12.5% contingency reductions. On January 29, 2009, the SF Human Services Commission called a special meeting, and Phil Arnold, then-Deputy Director of HSA, presented the HSA Budget Reduction Plan for FY 2009-2010. The January 29th Human Services Commission minutes reflect that the Union sent representatives and that SEIU 1021 spoke in opposition to the proposed reductions.

As SEIU was aware, in early 2009 HSA experienced a budget crisis, and, as a result, laid off a number of 2905 Senior Eligibility Workers. Many of the laid off workers were placed on a holdover list, while others were reinstated into their former 2903 Eligibility Worker classification. Responding to the Mayor's aforementioned general budget instructions, HSA determined that flex-staffing was no longer feasible for budgetary reasons. In response to the Budget Instructions, and in compliance with the directive to seek efficiencies in its operations, HSA budgeted vacant 2903 positions in the Annual Salary Ordinance ("ASO") and hired the eight laid off 2905s into the vacant 2903 positions.

The Union claimed that the department changed a core process of the flex program (i.e., that positions in 2905 classifications were flexibly staffed and normally filled by advancement from the 2903 classifications). However, contrary to the Union's assertion, flex staffing is not mandatory under the Civil Service Commission Rules.

Examples that flex staffing and promotive appointments are not mandatory include previous HSAs 2903/2905 job announcements (e.g., in 2007 and 1995) posted that "permanent appointees from a 2903 eligible list may advance to appointments in job code 2905..." and the Department of Public Health has never had flexible staffing for its 2903 positions.¹

The Civil Service Rule 111.16 contemplates that Appointing Officers may choose not to flexibly staff when budget constraints limit or prohibit the ability for incumbents to be flexibly appointed from a lower to a higher classification. Therefore, the Appointing Officer's decision to not flexibly promote does not constitute a unilateral change, as the Union characterized; rather, such limitations on the flex program demonstrate how the Rule allows departments to adhere to budgetary authority. The Rule clearly provides that appointments to the higher classification are not automatic, but are

¹ The Department of Public Health ("DPH") does not flex the 2903 Eligibility Worker, and does not use 2905 Senior Eligibility Workers. DPH does have a promotive classification, 2908 Hospital Eligibility Worker, but 2903s are not flexed up to this classification.

subject to additional criteria, whereby the Human Resources Director shall consider, “among other factors, length of permanent service, performance appraisal ratings, position availability, budgetary restrictions and equal employment opportunity. The specific procedures and qualifications established shall be listed in the flexible staffing examination announcement for the class(es) involved.”

HSA has had job announcements (e.g., May 18, 2007, November 9, 2007 and March 24, 1995) recruiting for classifications 2903/2905 Eligibility Worker/Senior Eligibility Worker, in which the announcements provided for, but did not guarantee, “flexible staffing” consistent with the 2903 classification specifications adopted on February 13, 1968, and later amended on January 7, 1972 and March 15, 1993; and 2905 classification specifications adopted on July 13, 1970, but later amended on January 17, 1972 and March 15, 1993. (See Attachment 4.)

However, the City did not always include flexible staffing on its recent job announcements (i.e., 1985). HSA’s February 15, 1985, 2905 classification job announcement only referenced the 2903 classification as an equivalent type of experience required; there was no reference to “flexible staffing” between these two classifications. At that time, applicants to class 2905 had to have experience as an Eligibility Worker to qualify, and, when the 1985 announcement was issued, workers in Medi-Cal were still classified as 2903s. Individuals seeking employment in the other assistance programs or in specialized positions had to participate in a 2905 examination. (See Attachment 5.)

Based on the above, advancement from an appointment in classification 2903 into an appointment in classification 2905 upon completion of one year of service is not automatic. In addition to having a competent and effective performance evaluation and the recommendation of the Appointing Officer, as stated in previous job announcements, “[a] promotion...is not automatic and may be delayed due to leaves, requisition constraint, prior eligible lists taking precedence or budgetary conditions” which were among the criteria used in evaluating whether to re-implement the flexible staffing program in 2009.

Civil Service Rule 111.16 gives DHR the authority to implement a flexible staffing program (or not) on an announcement-by-announcement basis. In early 2009, HSA was (and continues to be) challenged with budgetary constraints, and HSA does not seek to re-implement this program. Therefore, the most current 2903 job announcement did not reference flexible staffing. If all Eligibility Workers who met the job requirements were to be flexed upward, in the current salary structure, the Department’s cost would be approximately \$2.5M. As described in Civil Service Rule 111.16, management has the right to not employ the flex staffing program and, in any case, the Union was made aware of this during the HSA Commission meeting as early as January 29, 2009.

Issue B

The Union claims that out-of-class work was being performed by the lower flex classes (e.g., 2903s) by being assigned to perform the full range of work performed by the upper flex classes (e.g., 2905s).

The Union claims that HSA is making job assignments without regard to the job classification. The Union has not shown this to be the case. The City may assign job tasks to any job classification so long as the duties are reasonably related to the job specification or job announcement. Many of the job duties at issue here fall under both the 2903 and 2905 classifications. Indeed, the Union has failed to point out any duties performed by 2903s that are outside the 2903 job description.

The City and SEIU 1021 MOU, paragraphs 320-329, defines out-of-class work/acting assignment pay as:

¶320. An employee assigned in writing by the Department Head to perform a substantial portion of the duties and responsibilities of a higher classification shall be entitled to out of class pay after the tenth (10th) work day (within a sixty (60) working-day period) of such an assignment, retroactive to the first (1st) day of the assignment. [Emphasis added]

.....
¶329. Requests for classification or reclassification review shall not be governed by this provision but shall be submitted to the Civil Service Commission whose determination is final and not subject to the grievance procedure.

CSC Rule 109.16.2 states:

109.16.2 [t]emporary out-of-class assignment means the assignment of an employee without change in class to perform the normal day-to-day duties and responsibilities of another classification. Records of such temporary out-of-class assignment shall be placed in the employee's personnel file. An employee assigned to temporary out-of-class assignment may also request that the appointing officer/designee place the record in the employee's personnel file contemporaneous with the assignment. The record of temporary out-of-class assignments must be verified and approved by the appointing officer/designee prior to placement in the personnel file. The Human Resources Director shall be responsible for administering and making effective the provisions of this Rule, and establishing such administrative controls and procedures as may be necessary. The decision of the Human Resources Director shall be subject to appeal to the Civil Service Commission.

Additionally, CSC Adviser No. 009-2000 provides:

[t]he Civil Service Commission establishes the definition and policy on temporary out-of-class assignments. The Department Head/Designee may make a temporary out-of-class assignment to maintain the provision of any public service. This means **the assignment of an employee without change in class to perform the day-to-day duties and responsibilities of another class.**

The basis of the Union's out-of-class MOU issue involves the reference to the 2903 classification as the entry-level class, while the 2905 classification is referred to as the journey-level class.

The Union made the same argument when it filed a grievance in 2010 alleging the same MOU violation, claiming HSA "unilaterally ended the practice of automatically promoting employees in Class 2903 Eligibility Workers to Class 2905 Senior Eligibility Workers after they had served one year in Class 2903." The grievance was appealed to arbitration and the City Attorney's Office declined to arbitrate, responding "[m]atters, including but not limited to, classification, application, examination and selection are within the exclusive jurisdiction of the civil service merit system... (see Charter A8.409-3 and 10.101)." The Union did not seek to compel arbitration, nor did SEIU appeal the issue to the Commission.

Based on HSA's review of the work performed by the 2903 classification, HSA has granted eight (8) out-of-class pay claims to current 2903s. These employees had previously worked as 2905s but were

laid off and reinstated as 2903s. HSA is in the process of reviewing seventy-seven (77) additional out-of-class claims.

The Union has asked what are the “administrative controls and procedures” established to “administer and make effective” the provisions of the Temporary Out-of-Class Assignment Rule. Pursuant to Civil Service Rule 109.16.2, when a temporary out-of-class assignment is in order, selection and retention is the appointing officer’s or designee’s discretion. DHR’s Classification and Compensation Unit continues to be available for guidance to departments on this issue. For purposes of consistency, DHR provides an Acting Assignment Request form to facilitate a department’s internal review process. Additionally, in compliance with Civil Service Rule 109.16, DHR and the Controller’s Budget Analyst’s Office periodically audit departments’ records for premiums and pay adjustments, including acting assignment pay, which provides the administrative control to effectuate the use of temporary out-of-class assignments. Allegations that a department failed to grant acting assignment pay would be adjudicated through the MOU’s grievance process.

The DHR Compensation Manual is another resource available to departments about acting assignment pay. It includes a table outlining the eligibility requirements (per the parties’ MOU) that apply in order for an employee to receive acting assignment pay. For SEIU Out-of-Class/Acting Assignment Pay, attached is a quick summary of the eligibility requirements. (See Attachment 6).

Therefore, the Union has not provided any evidence to support the allegations that the 2903s are performing duties inconsistent with their classification or that the “controls and procedures” as mentioned-above are not serving their purpose. To the extent that such claims exist, they should be addressed via the MOU grievance procedure.

Conclusion/Recommendation

Pursuant to Civil Service Rule 111.16, the Rules provide the Human Resources Director discretion to either establish or suspend the use of flexible staffing programs on an announcement-by-announcement basis. The decision to not employ the flexible staffing was based on HSA’s budgetary constraints and was well within management’s right.

The City’s recommendation is that the Commission consider this matter closed.

ATTACHMENTS

- Attachment 1: 2903 Classification Specification (current)
- Attachment 2: 2012 HSA/DPH 2903 Job Announcement (CBT-2903-059333)
- Attachment 3: SEIU Major Flexible-Staffing Classification Issues (May 16, 2013)
- Attachment 4: HSA 2903/2905 Job Announcements (1995, 2007)
- Attachment 5: HSA 2905 Job Announcement (1985)
- Attachment 6: SEIU Memorandum of Understanding Out-of-Class/Acting Assignment Pay

cc: Micki Callahan, Department of Human Resources
Ted Yamasaki, Department of Human Resources
Luenna Kim, Human Services Agency
Steve Ponder, Department of Human Resources

Attachment 1
2903 Classification Specification (Current)



Department of Human Resources

[Close](#) [Print](#)

Eligibility Worker (#2903)

\$24.93-\$30.30 Hourly / \$4,320.00-\$5,252.00 Monthly / \$51,844.00-\$63,024.00 Yearly



[Email Me when a Job Opens for the above position\(s\)](#)

Definition

Under general supervision, to perform a variety of technical duties in the review and determination of initial and continuing client eligibility for a variety of public assistance programs.

Distinguishing Features

Positions in this classification are responsible for carrying out well defined rules and regulations pertaining to various categorical aid programs and explaining them to applicants and the general public. Positions in this class have regular contacts with clients, their relatives, and representatives of outside agencies and the public.

2903 Eligibility Worker This is the entry level class in the Eligibility Worker series. This class is distinguished from the 2905 Senior Eligibility Worker and 2908 Hospital Eligibility Worker by tasks and duties being performed under closer supervision. Since this class is typically used as a training class, employees may have only limited or no directly related work experience.

2905 Senior Eligibility Worker Employees within this class are distinguished from the 2903 Eligibility Worker by the performance of the full range of duties as assigned. 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. Positions in this class are flexibly staffed and are normally filled by advancement from the class 2903 level, or when filled from the outside, require prior related work experience.

The 2905 class is distinguished from the 2908 Hospital Eligibility Worker in that the 2908 identifies and determines client eligibility for medical coverage under the terms of various private health plans and public assistance programs, whereas the class 2905 determines client eligibility for public assistance programs and certifies for reimbursement.

Additionally, the 2905 class is distinguished from the 2913 Program Specialist in that the 2913 class performs higher level technical assignments than the 2905 class.

Examples of Important and Essential Duties

"The class specification shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 7)

1. Schedule and interview clients in the offices of the Department of Social Services, in the client's home, or in hospitals and various institutions to determine new or continuing program eligibility.
2. When assigned to hospital, admit and register patients for hospital care; obtain demographic information.
3. Coordinate transfers of patients between counties; inform clients of procedures and necessary reports.
4. Explain eligibility programs, qualification standards, policy and procedure to clients; assist clients in completion of applications, forms and reports when necessary; review and evaluate applications for completeness and accuracy; prepare client budget to determine eligibility.
5. Apply legal criteria to determine eligibility; provide recommendations regarding financial eligibility for assistance programs; determine eligibility and grant amount according to established policies and procedures; review and determine re-certification.
6. Prepare case records related to client eligibility information and financial assistance received; update case records; submit required reports.

- 7. Investigate statements and information received from applicant through the use of telephone or written verifications.
- 8. Investigate and resolve client problems involving non-receipt of benefits.
- 9. Review cases with supervisor in assessing the quality of the eligibility determination process and procedure.
- 10. Compose and prepare correspondence to clients, references, and State agencies; gather statistical data and prepare reports as required.
- 11. Answer questions and provide information to clients and the general public regarding assigned program area.
- 12. Refer clients in need of case work services to members of social service staff; may provide limited referrals to resources within the community on matters related to income maintenance; refer clients to appropriate agencies according to established procedures.
- 13. Perform related duties as required.

Knowledge, Skills and Abilities

Knowledge, Abilities, and Skills: Knowledge of: Basic interviewing and investigative skills and techniques; office procedures, methods and computer equipment; basic mathematics.

Ability to: Learn departmental programs, policies, procedures and terminology; learn principles and procedures of record keeping; learn to interpret and apply pertinent Federal, State, local and departmental laws, rules, regulations, policies and procedures regarding assigned program; learn to plan, organize and prioritize caseload; learn to interview applicants for public assistance and obtain confidential information relative to personal, family, financial, medical or other circumstances of client relating to eligibility; learn to evaluate data and provide recommendations on eligibility of client; maintain accurate records and meet program deadlines; operate a computer terminal and standard office machines; make accurate mathematical computations; type and enter data at a speed necessary for successful job performance; effectively communicate with and elicit information from clients in difficult situations; apply Federal, State, and local Equal Employment, Affirmative Action, and Civil Rights laws, procedures, and regulations; communicate clearly and concisely, both orally and in writing; establish and maintain cooperative working relationships with those contacted in the course of work.

Knowledge of: Principles and practices of caseload management; Federal, State, local laws, rules, regulations, policies, and procedures regarding assigned program area; services offered by related agencies; departmental programs, policies, procedures and terminology.

Ability to: Interview applicants for public assistance and obtain appropriate information, often in different languages, or dialects of English; accurately gather, record and evaluate data necessary for the determination of eligibility; interpret and apply Federal, State and local policies, procedures, laws and regulations; work independently with minimal supervision.

Notes

Amended: 3/15/93

Disaster Service Workers

All City and County of San Francisco employees are designated Disaster Service Workers through state and local law (California Government Code Section 3100-3109). Employment with the City requires the affirmation of a loyalty oath to this effect. Employees are required to complete all Disaster Service Worker-related training as assigned, and to return to work as ordered in the event of an emergency.

CLASS: 2903 EST: REV: FORMERLY JOB TITLE: REPLACES JOB TITLE:
EEOC: 3 MEDICAL:

Attachment 2
2012 HSA/DPH
2903 Job Announcement (CBT-2903-059333)



[sfgov](#) | [residents](#) | [business](#) | [government](#) | [visitors](#) | [online services](#) | [search](#)

[Current Job Openings](#) | [My Applications](#) | [Update Contact Info](#) | [Job Descriptions/Future Openings](#) | [Dept of Human Resources](#)

2903 Eligibility Worker

(Human Services Agency/Department of Public Health)
Recruitment #CBT-2903-059333

Department:	Public Health
Analyst:	Richard Hodgkinson
Date Opened:	9/14/2012 8:00:00 AM
Filing Deadline:	9/21/2012 5:00:00 PM
Salary:	\$51,844.00 - \$63,024.00/year
Job Type:	CBT Discrete
Employment Type:	Full-Time

[Go Back](#) [View Benefits](#)

INTRODUCTION

When assigned to the Human Services Agency, incumbents under general supervision perform a variety of duties in order to make eligibility determinations for public assistance in a variety of human service programs and to provide required services to clients from diverse cultural and socio-economic backgrounds.

The essential job functions include the following: assisting clients with the completion of applications and forms; answering a variety of questions regarding information requested on applications; helping clients gather needed and required information and documentation; interpreting and enforcing federal, state, and local laws and regulations pertaining to eligibility determination; explaining regulations and procedures to clients and others as necessary; speaking and working with clients from diverse backgrounds who may be mistrustful, hostile, mentally and/or physically ill; completing and organizing a large number of forms; meeting required deadlines in all phases of the job; utilizing Windows based systems by entering information into appropriate data/inquiry fields and windows; providing outreach services; making home visits; making referrals for client services to other social services programs and community agencies; writing case narratives, memos, letters; filing and maintaining detailed case records; reviewing computer reports in order to update caseload eligibility and manage workflow. All these functions must be performed within strict time frames according to assigned program policies and procedures. Performs other related duties as assigned/required.

When assigned to the Department of Public Health, Eligibility Workers will work at various public health facilities throughout the City. Incumbents work under general supervision, perform a variety of eligibility and related clerical and administrative duties. The nature of these positions requires employees to work various shifts including, PM shifts, and Midnight shifts. Employees may also work weekends and holidays.

The essential job functions include the following: performs eligibility and registration functions to secure maximum reimbursement; interviews applicants, clients or other representatives to acquire detailed personal or confidential information; initiate a total-household assistance interview to determine eligibility for financial assistance under the terms of various Federal, State or County Health Care Programs; enters demographic and financial information on the computer; assists with the completion of applications and forms; obtains information from and provides information to applicants; interprets and enforces Federal, State and local regulations; assists with authorization for care or transfer of patients; initiates and processes work through

an automated system; plans and organizes accordingly to ensure work is completed in accordance with regulations relating to eligibility and timeliness; reviews eligibility factors and re-computes benefit amounts periodically according to prescribed time intervals as required by the appropriate program; participates in special projects, studies, or work assignments; answers phones and schedules patient appointments; assists patients with special needs due to disability, illness, physical, age and/or language limitations; provides excellent customer service to clients and coworkers by remaining courteous and helpful at all times. Performs other related duties as assigned/required.

MINIMUM QUALIFICATIONS

1. Two (2) years of direct public contact clerical work experience which must have included the following: use of computer applications to input, retrieve and analyze information; working with a diverse client population; performing responsibilities involving interviewing to acquire detailed personal or confidential information; interpreting and applying rules, regulations and policies; creating and processing documents related to financial or personal histories of clients; and assisting clients with the completion of forms or correspondence;

OR

2. One (1) year of experience determining eligibility for health and/or social services programs, loans, financial assistance, unemployment or veterans benefits:

OR

3. Sixty (60) semester units or ninety (90) quarter units from an accredited college or university.

Substitution: Thirty (30) semester units or forty-five (45) quarter units from an accredited college or university may substitute for one (1) year of the work experience under qualification pattern number one (1) above.

ALL APPLICANTS MUST POSSESS THE REQUIRED MINIMUM QUALIFICATIONS AT THE TIME OF FILING

HOW TO APPLY

Applications for City and County of San Francisco jobs are being accepted through an online process. Visit www.jobaps.com/sf to register an account (if you have not already done so) and begin the application process.

- Select the desired job announcement
- Select "Apply" and read and acknowledge the information
- Select either "I am a New User" if you have not previously registered, or "I have Registered Previously"
- Follow instructions on the screen

If you are a current CCSF employee with permanent status in Class 2903 Eligibility Worker and wish to be considered for transfer or reinstatement to a position in the same classification within the department/agency for which this announcement has been issued, you must submit an Employee Request for Transfer form (see <http://sfdhr.org/Modules/ShowDocument.aspx?documentid=11618>) or an Employee Request for Reinstatement form.

Computers are available for the public (from 8:00 a.m. to 5:00 p.m. Monday through Friday) to file online applications in the lobby of the Dept. of Human Resources at 1 South Van Ness Avenue, 4th Floor, San Francisco.

Applicants may be contacted by email about this announcement and, therefore, it is their responsibility to ensure that their registered email address is accurate and kept up-to-date. Also, applicants must ensure that email from CCSF is not blocked on their computer by a spam filter. To prevent blocking, applicants should set up their email to accept CCSF mail from the following addresses (@sfgov.org, @sfdpw.org, @sfport.com, @flysf.com, @sfwater.org, @sfdph.org, @asianart.org, @sfmta.com).

Applicants will receive a confirmation email that their online application has been received in response to every announcement for which they file. Applicants should retain this confirmation email for their records. Failure to receive this email means that the online application was not submitted or received. All work experience, education, training and other information substantiating how you meet the minimum qualifications must be included on your application by the filing deadline. Information submitted after the filing deadline will not be considered in determining whether you meet the minimum qualifications. Applications completed improperly may be cause for ineligibility, disqualification or may lead to lower scores.

If you have any questions regarding this recruitment or application process, please contact the exam analyst, Richard Hodgkinson, by telephone at 415-557-5573 or by email at Richard.Hodgkinson@sfgov.org

SELECTION PLAN

WRITTEN EXAMINATION (Weight – 100%)

Candidates will be administered a written multiple-choice test designed to measure knowledge, skills and/or abilities in job-related areas which may include but are not limited to:

- Ability to establish and maintain effective and cooperative working relationships, and to effectively work with others
- Ability to interview clients
- Ability to communicate written information in a clear and concise manner to clients and staff
- Ability to read, review, and evaluate written information
- Ability to file, prepare, organize and maintain records
- Ability to use mathematical formulas.
- Ability to comprehend and interpret written information
- Knowledge and ability to interpret policies, rules, and procedures

This is a standardized examination and, therefore, test questions and test answers are not available for public inspection or review.

Special Condition Bilingual Proficiency:

Some positions may require bilingual proficiency in a variety of languages depending on the department's bilingual needs. Only those eligibles who pass the bilingual proficiency test will be considered for bilingual positions. Applicants must indicate on the application the language(s) in which they claim proficiency

Requests:

Applicants with disabilities who meet the minimum eligibility requirements for this job announcement can find information on requesting a reasonable ADA Accommodation at:

<http://www.sfdhr.org/index.aspx?page=20#applicantswithdisabilities>

Information regarding requests for Veterans Preference can be found at:

<http://www.sfdhr.org/index.aspx?page=20#veteranspreference>

Verification:

Applicants may be required to submit verification of qualifying education and experience at any point in the application, examination and/or departmental selection process. **Note:** Falsifying one's education, training, or work experience or attempted deception on the application may result in disqualification for this and future job opportunities with the City and County of San Francisco. For more information on verification, please visit the following link:

<http://www.sfdhr.org/index.aspx?page=20#verification>

Certification Rule:

The certification rule for the eligible list resulting from this examination will be Rule of Three Scores. Additional selection processes will be conducted by the hiring department prior to making final hiring decisions.

Eligible List:

The eligible list resulting from this examination is subject to change after adoption (e.g., as a result of appeals), as directed by the Human Resources Director or the Civil Service Commission.

The duration of the eligible list resulting from this examination process will be 24 months, and may be extended with the approval of the Human Resources Director.

General Information concerning City and County of San Francisco Employment Policies and Procedures:

Important Employment Information for the City and County of San Francisco can be obtained at

<http://www.sfdhr.org/index.aspx?page=20> or hard copy at 1 South Van Ness Avenue, 4th Floor.

Terms of Announcement:

Applicants must be guided solely by the provisions of this announcement, including requirements, time periods and other particulars, except when superseded by federal, state or local laws, rules or regulations. Clerical errors may be corrected by the posting the correction on the Department of Human Resources website at www.jobaps.com/sf.

Copies of Application Documents:

Applicants should keep copies of all documents submitted, as these will not be returned.

Right to Work:

All persons entering the City and County of San Francisco workforce are required to provide verification of authorization to work in the United States.

Exam Type:
Entrance
Issued: 9/14/12
Micki Callahan, Human Resources Director
Department of Human Resources
Recruitment ID Number: CBT-2903-059333
HSA/RH/415.557.5573

DISASTER SERVICE WORKERS

All City and County of San Francisco employees are designated Disaster Service Workers through state and local law (California Government Code Section 3100-3109). Employment with the City requires the affirmation of a loyalty oath to this effect. Employees are required to complete all Disaster Service Worker-related training as assigned, and to return to work as ordered in the event of an emergency.

BENEFITS

All employees hired on or after January 10, 2009 will be required (pursuant to San Francisco Charter Section A8.432) to contribute 2% of pre-tax compensation to fund retiree healthcare. In addition, most employees are required to make a member contribution towards retirement, typically a 7.5% of compensation. For more information on these provisions, please contact the personnel office of the hiring agency.

For more information about benefits, please click here.

Contact us via
conventional means.

You may contact us by phone at (415) 557-4800, or apply for a job in person at the Department of Human Resources.

[contact us](#) | [accessibility policy](#) | [disclaimer](#) | [privacy policy](#)

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Attachment 3
SEIU Major Flexible-Staffing Classification
Issues (May 16, 2013)

Major Flexible-Staffing Classification Issues of Affected Incumbents

Presented to DHR by Sin Yee Poon, Representative of Affected Incumbents

Per our agreement to exchange information electronically, below are the major flexible-staffing classification issues we currently have:

- ◆ Unilateral Changes – reports from our affected members are that at some point during the economic and budget crisis, HSA managers informed members that the Agency was “suspending” the flexing up in the flexible staffing series classes. The rationale was that management anticipated layoffs, and that, should the newly flexed employees (ex: 2903s to 2905s) get laid off, they would have to reinstate back to the lower flex classification and that would not make sense. The Union was never notified of this unilateral management decision.
 - We are additionally informed by members that this unilateral moratorium was never lifted and at some point in time, managers informed newly hired members in the lower flex classes that they will “never” be “flexed.” Thus, Management apparently implemented a unilateral change in the core process of the flex program, without formal notice to the public, the incumbents, affected employees, or the Union. There has not been confirmation of this decision by HSA/City, but HSA has not flex or promoted any lower flex incumbents during this time period.
 - Questions for DHR: Has the City indeed implemented this change? And, if so, has the Union been notified of this change?
- ◆ Violation of the official job specifications – The job specifications are clear in terms of the work performed by the lower flex classes versus the upper flex classes. The job specs clearly delineate the level of responsibility, the type of duties, and the essential functions of each class. For example, the 2903/2905 job specs spell out the following:

2903 Eligibility Worker This is the entry level class in the Eligibility Worker series. This class is distinguished from the 2905 Senior Eligibility Worker and 2908 Hospital Eligibility Worker by tasks and duties being performed under closer supervision. Since this class is typically used as a training class, employees may have only limited or no directly related work experience.

2905 Senior Eligibility Worker Employees within this class are distinguished from the 2903 Eligibility Worker by the performance of the full range of duties as assigned. 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. Positions in this class are

flexibly staffed and are normally filled by advancement from the class 2903 level, or when filled from the outside, require prior related work experience.

The issue is that HSA and CSS (and possibly other Departments) are assigning lower flex incumbents (e.g. 2903s) to perform the full range of work that is performed by the upper flex classes (e.g. 2905s). This is in violation of the official job specifications and is taking advantage, both in terms of fair monetary compensation and actual working conditions (i.e. being thrown in with the upper flex incumbents and no longer receiving the training, close supervision and instructions, and help intended for the training/entry level class), of line workers, who are providing direct services to the City's clients/customers. The City has created promotional tracks for and has upwardly reclassified Management personnel, so that the ranks of middle and upper management have swelled considerably, along with the compensation including bonuses, etc., of the affected managers. On the other hand, during this same period, the City has been exploiting line workers by not paying them the rightful and proper wages for the work they performed. The inequity is staggering. Given additionally that the ranks of the affected line workers are most overwhelmingly women and people of color, the discriminatory treatment is in violation of the public trust (and the law).

- Question for DHR: Is it the position of the City that Departments can make assignments without regard to the official job specifications of the classification of the employee?
- ◆ Exceeding the Authority granted by the Civil Service Rules – The Civil Service Rules make multiple references to the authority of the Appointing Officers, including the authority to assign work. This authority has been violated:

- The Rules state:

The appointing officer has the authority to assign an employee to perform work provided that it is consistent with the type of duties and level of responsibility of the employee's class.

By assigning the lower flex class incumbents (e.g. 2903s) to perform the work of the 2905s, the Appointing Officers of the Human Services Agency, Child Support Services, (and possibly other Departments) are continually in violation of the Rules in exceeding the authority granted by the Rules to assign work.

- The Temporary Out-of-Class Assignment Rules additionally state, again in multiple references:

In accordance with this Rule, an appointing officer may exercise Charter authority to assign an employee to perform any of the duties of the department to which appointed and to make any temporary out-of-class assignment to maintain the provision of any public service.

By assigning the lower flex class incumbents (e.g. 2903s) to perform permanent out-of-class work (as evidenced by the no-more-flexing unilateral change), i.e. the work of the upper flex classes (e.g. 2905s), the Appointing Officers of HSA, CSS, (and possibly other Departments) are continually in violation of the Rules in exceeding the authority granted by the Rules to assign out-of-class work.

Additionally, under the same Temporary Out-of-Class Assignment section, DHR's responsibility is also delineated:

The Human Resources Director shall be responsible for administering and making effective the provisions of this Rule, and establishing such administrative controls and procedures as may be necessary.

- Questions for DHR: What are the "administrative controls and procedures" that DHR has established to "administer and make effective" the provisions of the Temporary Out-of-Class Assignment Rule? And why have these "controls and procedures" not been utilized to halt the permanent out-of-class assignments of the lower flex incumbents at HSA, CSS, and possibly other Departments?

Please let me know if you have questions or need clarifications regarding these issues. We look forward to your response to our concerns.

Eerie

Attachment 4
1995 and 2007 HSA
2903/2905 Job Announcements

11/07



**City & County of San Francisco
Department of Human Resources**

EMPLOYMENT OPPORTUNITY- PERMANENT APPOINTMENT

**Class 2903/2905 Eligibility Worker/
Senior Eligibility Worker
Flexible Staffing
Human Services Agency Only**

Analyst : Myrna Briones
Date Opened : November 9, 2007
Filing Deadline : November 16, 2007
Job Type : Permanent
Employment Type : Full-Time

INTRODUCTION

Under general supervision performs a variety of duties in order to make eligibility determinations for public assistance in a variety of human service programs and to provide required services to clients from diverse cultural and socio-economic backgrounds. The essential functions include: assist clients with the completion of applications and forms and answer questions regarding information requested on applications; help clients gather needed information and documentation; interpret and enforce federal, state, and local laws and regulations pertaining to eligibility determination; explain regulations and procedures to clients and others as necessary; speak and work with clients with diverse background who may be mistrustful, hostile or, mentally or physically ill; complete and organize large number of forms; meet required deadlines in all phases of the job; utilize PC and Windows based systems by entering information using a computer into appropriate data/inquiry fields and windows; providing outreach services; making home visits; make referrals for client services to other social services programs and community agencies; write case narratives, memos, letters; file and maintain detailed case records and review computer reports to update caseload eligibility and manage workflow. All these functions must be performed within strict time frames according to assigned program policies and procedures. Performs other related duties as required.

FLEXIBLE STAFFING:

Certain positions have been designated as flexible staffing positions. A separate eligible list will be established for Class 2905 Senior Eligibility Worker. Permanent appointees from a 2903 eligible list may advance to appointments in job code 2905 upon completion of one year (2000 hours) of service in job code 2903 in the same department, a competent and effective performance evaluation, and the recommendation of the Appointing Officer. A promotion to job code 2905 is not automatic and may be delayed due to leaves, requisition constraint, prior eligible lists taking precedence or budget conditions.

MINIMUM QUALIFICATIONS:

1. Two (2) years (4000 hours) of experience directly serving a diverse client/customer population on a daily basis; interviewing client/customers to acquire detailed personal or confidential information; interpreting and applying rules, regulations and policies; creating and processing documents related to financial or personal histories of clients/customers; assisting clients/customers with the completion of forms or correspondence; and, one (1) year of experience using computer applications to input, retrieve, and analyze information. **OR**
2. One (1) year (2000 hours) of experience as an Eligibility Worker in a county or state administered welfare program. This experience must be equivalent to 12 months of full time work performed by 2903 Eligibility Worker, 2905 Senior Eligibility Worker, 2908 Hospital Eligibility Worker or 9702/9703 Employment and Training Specialist I & II in the City and County of San Francisco.

ALL APPLICANTS MUST POSSESS THE REQUIRED MINIMUM QUALIFICATIONS AT THE TIME OF FILING.

SUBSTITUTION:

Candidates qualifying under #1 above may substitute two years of educational coursework from an accredited college or university (60 semester or 90 quarter units) for one year of experience. At least 12 semester units or 18-quarter units must be in behavioral sciences (social work, sociology, psychology, cultural anthropology or closely related discipline). Four years of educational coursework from an accredited college or university (120 semester units or 180 quarter units) may substitute for all the required experience, if at least 24 semester units or 36-quarter units are in behavior science.

HOW TO APPLY:

Distribution of special application packet will be available for **ONE DAY ONLY** at the Human Services Agency 1650 Mission Street, San Francisco on **Wednesday, May 23, 2007 between 8:30 am. and 4:30 pm.** All applicants **MUST** complete and mail the City and County of San Francisco application to HSA Examination Unit, Attn: P302, P.O. Box 7988, San Francisco, CA 94120. **THE FINAL FILING DATE IS FRIDAY, June 1, 2007. HAND DELIVERED AND PHOTOCOPIED APPLICATION WILL NOT BE ACCEPTED.** Applications must be postmarked no later than the final filing date. Late applications and applications delivered with insufficient postage will not be accepted.

VERIFICATION:

Verification of qualifying education and experience may be required at any point in the selection process or prior to appointment. Failure to submit the required verification, if requested, may result in rejection of the application or ineligibility of employment.

SELECTION PROCEDURES:**Weight**

Continuous testing for Class 2903/2905 Eligibility Worker/Senior Eligibility Worker will be conducted. The names of successful candidates will be placed on the eligible list in rank order.

Written Examination:**100%**

Candidates will be tested to determine their relative knowledge, skills and abilities in job related areas. These may include but are not limited to knowledge of principles and techniques of interviewing, ability to interpret and apply rules, regulations and policies, knowledge of basic mathematics.

CERTIFICATION RULE:

The certification rule for the eligible list resulting from this selection procedure will be Rule of Three (3) Scores.

General Notes:

1. Applicants are advised to keep copies of all documents submitted. Submitted documents become a permanent part of the exam record and will not be returned. Hiring department may require applicants to present additional material at the time of appointment and/or at a later date.
2. For positions which require possession of a current California class 3C driver license, a current copy of the driver license and a current Motor Vehicle Record (MVR) must be submitted prior to appointment. Applicants for positions which require a current driver license must possess a good driving record, defined as not having their driving privilege suspended, revoked, or being placed on probation by the DMV for a cause involving the safe operation of a motor vehicle within the preceding three (3) years. Violations will be reviewed on an individual basis and may be cause for non-selection or disciplinary action, if employed.
3. Some positions require bilingual fluency in other languages in addition to English. Language proficiencies must be indicated on the front of the application. Candidates who indicate bilingual ability will be required to demonstrate language proficiency in reading, writing and speaking prior to appointment to a bilingual position.
4. Applicants with disabilities requiring reasonable accommodation for this process must contact the analyst by phone at (415) 557-5688, or if hearing impaired at (415) 775-9484 (TDD), or in writing (specify Class 2903/2905) at the address listed above as soon as possible.
5. Prior to appointment, at the Department's expense, applicants must take a TB screening test, and a medical examination.

ENTRANCE

Micki Callahan, Human Resources Director

Department of Human Resources

Announcement #: 053687

Issued: May 18, 2007

Contact Information: MGB, HSA (415) 557-5688

Amended and re-issued: November 9, 2007

**MINORITIES, WOMEN AND PERSONS WITH DISABILITIES ARE ENCOURAGED TO APPLY
AN EQUAL OPPORTUNITY EMPLOYER**

year (2000 hours) of service in job code 2903 in the same department, a competent and effective performance evaluation, and the recommendation of the Appointing Officer. A promotion to job code 2905 is not automatic and may be delayed due to leaves, requisition constraint, prior eligible lists taking precedence or budget conditions.

MINIMUM QUALIFICATIONS:

1. Two (2) years (4000 hours) of experience directly serving a diverse client/customer population on a daily basis; interviewing client/customers to acquire detailed personal or confidential information; interpreting and applying rules, regulations and policies; creating and processing documents related to financial or personal histories of clients/customers; assisting clients/customers with the completion of forms or correspondence; and, one (1) year of experience using computer applications to input, retrieve, and analyze information. **OR**
2. One (1) year (2000 hours) of experience as an Eligibility Worker in a county or state administered welfare program. This experience must be equivalent to 12 months of full time work performed by 2903 Eligibility Worker, 2905 Senior Eligibility Worker, 2908 Hospital Eligibility Worker or 9702/9703 Employment and Training Specialist I & II in the City and County of San Francisco.

ALL APPLICANTS MUST POSSESS THE REQUIRED MINIMUM QUALIFICATIONS AT THE TIME OF FILING.

SUBSTITUTION:

Candidates qualifying under #1 above may substitute two years of educational coursework from an accredited college or university (60 semester or 90 quarter units) for one year of experience. At least 12 semester units or 18-quarter units must be in behavioral sciences (social work, sociology, psychology, cultural anthropology or closely related discipline). Four years of educational coursework from an accredited college or university (120 semester units or 180 quarter units) may substitute for all the required experience, if at least 24 semester units or 36-quarter units are in behavior science.

HOW TO APPLY

Distribution of special application packet will be available for **ONE DAY ONLY** at the Human Services Agency, 1650 Mission Street, San Francisco on **Wednesday, May 23, 2007 between 8:30 am. and 4:30 pm.** All applicants **MUST complete and mail** the City and County of San Francisco application to HSA Examination Unit, Attn: P302, P.O. Box 7988, San Francisco, CA 94120. **THE FINAL FILING DATE IS FRIDAY, June 1, 2007. HAND DELIVERED AND PHOTOCOPIED APPLICATION WILL NOT BE ACCEPTED.** Applications must be postmarked no later than the final filing date. Late applications and applications delivered with insufficient postage will not be accepted.

VERIFICATION:

Verification of qualifying education and experience may be required at any point in the selection process or prior to appointment. Failure to submit the required verification, if requested, may result in rejection of the application or ineligibility of employment.

SELECTION PROCEDURES:

Weight

Screening Committee:

Qualifying

In the event of a large number of qualified candidates, a screening committee of experts will evaluate candidate's applications to assess relative knowledge, skill and ability in job related areas to select the most qualified candidates to continue in the selection process. Applicants meeting the minimum qualifications are not guaranteed advancement in the process.

Written Examination:

100%

Candidates will be tested to determine their relative knowledge, skills and abilities in job related areas. These may include but are not limited to knowledge of principles and techniques of interviewing, ability to interpret and apply rules, regulations and policies, knowledge of basic mathematics.

CERTIFICATION RULE:

The certification rule for the eligible list resulting from this selection procedure will be Rule of Three (3) Scores.

General Notes:

1. Applicants are advised to keep copies of all documents submitted. Submitted documents become a permanent part of the exam record and will not be returned. Hiring department may require applicants to present additional material at the time of appointment and/or at a later date.
2. For positions which require possession of a current California class 3C driver license, a current copy of the driver license and a current Motor Vehicle Record (MVR) must be submitted prior to appointment. Applicants for positions which require a current driver license must possess a good driving record, defined as not having their driving privilege suspended, revoked, or being placed on probation by the DMV for a cause involving the safe operation of a motor vehicle within the preceding three (3) years. Violations will be reviewed on an individual basis and may be cause for non-selection or disciplinary action, if employed.
3. Some positions require bilingual fluency in other languages in addition to English. Language proficiencies must be indicated on the front of the application. Candidates who indicate bilingual ability will be required to demonstrate language proficiency in reading, writing and speaking prior to appointment to a bilingual position.

4. Applicants with disabilities requiring reasonable accommodation for this process must contact the analyst by phone at (415) 557-5688, or if hearing impaired at (415) 775-9484 (TDD), or in writing (specify Class 2903/2905) at the address listed above as soon as possible.
5. Prior to appointment, at the Department's expense, applicants must take a TB screening test, and a medical examination.

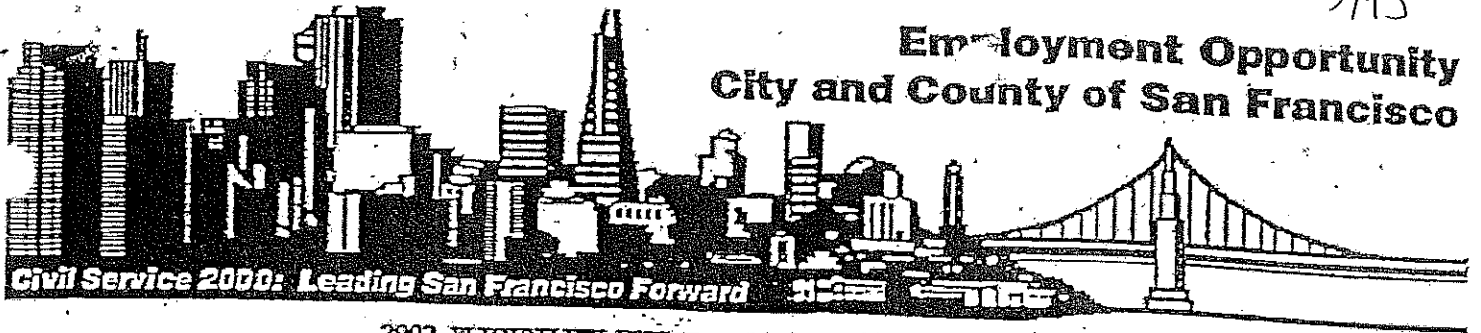
ENTRANCE

James P. Horan, Acting Human Resources Director
Department of Human Resources
Announcement #: 053687
Issued: May 18, 2007
Contact Information: MGB, HSA (415) 557-5688

**MINORITIES, WOMEN AND PERSONS WITH DISABILITIES ARE ENCOURAGED TO APPLY
AN EQUAL OPPORTUNITY EMPLOYER**

3/95

Employment Opportunity City and County of San Francisco



2903 ELIGIBILITY WORKER - 2905 SENIOR ELIGIBILITY WORKER FLEXIBLE STAFFING DEPARTMENT OF SOCIAL SERVICES ONLY

The Eligibility Worker is the entry level class in the Eligibility series. Under general supervision, this classification performs determinations of eligibility for public assistance in such programs as Adult Services, Aid to Families with Dependent Children (AFDC), Food Stamps, General Assistance (GA) or Medi-Cal. The essential functions include interviewing clients to obtain detailed personal or confidential information relative to eligibility determination; assisting with the completion of applications and forms; answering questions regarding benefits; reviewing completed applications; speaking with clients who may be fearful, hostile or physically or mentally ill; interpreting and enforcing Federal, State and local regulations and policies; completing and organizing large numbers of forms; inputting client information into a computer terminal; making referrals for client services to public and private agencies; writing detailed case narrative reports; filing documents and maintaining well-organized case records; and reviewing computer reports to update caseload eligibility and manage the work flow. All functions must be performed within strict time frames according to assigned Program policies and procedures. Performs other related duties as required. The annual salary range is \$30,511 - \$36,905.

FLEXIBLE STAFFING: Certain positions have been designated as flexible staffing positions. A separate eligible list will be established for class 2905 Senior Eligibility Worker. Permanent appointees from a class 2903 eligible list may advance to appointments in class 2905 Senior Eligibility Worker upon completion of one year of service in class 2903 in the same Department, a competent and effective performance evaluation and the recommendation of the Appointing Officer. Promotions at DSS will also require the completion of a structured training program and a qualifying score on a technical job knowledge test. A promotion to class 2905 is not automatic and may be delayed due to leaves, requisition constraints, prior eligible lists taking precedence or budgetary restrictions.

NOTE: Certified Permanent class 2903 employees in departments other than DSS who are successful in this examination will be placed under general waiver on the resultant class 2903 eligible list. This waiver is required by Civil Service Commission Rules which stipulate that an employee cannot be certified to a classification in which permanent status is currently held. Certified permanent class 2903s under such general waiver who wish to work in a flexibly-staffed department may apply for a permanent lateral transfer which is subject to the approval of the Appointing Officer in the new department. This waiver may also be lifted if the individual requests it in writing from the Human Resources Director. In either instance, one year of service in class 2903 in the new department is required before the employee can be considered for a promotion to class 2905.

MINIMUM QUALIFICATIONS: Two (2) years' (4000 hours) experience in interviewing to acquire detailed, personal or confidential information from clients or the general public. This must have included the processing of documents relating to the financial or personal histories of clients or the general public or which involved assisting the public with the completion of forms or correspondence. Experience can be gained in public or private social service agencies, employment agencies, veterans' assistance, social security, workers' compensation, or rehabilitation service agencies, hospitals and clinics, schools, insurance agencies, financial institutions, retail credit, customer service and related areas of employment. Ability to learn to use a computer keyboard is required.

SUBSTITUTION: Two (2) years of educational coursework from an accredited college or university (60 semester or 90 quarter units) may substitute for one year (12 months) of the required experience. Applicants who qualify under this substitution must have at least 12 semester or 18 quarter units in behavioral science (social work, sociology, psychology and cultural anthropology) OR Four (4) years of educational coursework from an accredited college or university (120 semester or 180 quarter units) may substitute for ALL of the required experience. Applicants who qualify under this substitution must have at least 24 semester or 36 quarter units in behavioral science.

Minorities, Women, and Persons with Disabilities are Encouraged to Apply
An Equal Opportunity Employer

VERIFICATION: Proof of all experience needed to qualify MUST be submitted with the application. This experience must be verified on employer letterhead, and must state applicant's name, job title, date of employment, number of hours worked per week, nature of duties and must be signed by the applicant supervisor or the personnel manager. Verification may be waived if impossible to obtain; for example if gained outside the USA or if the former employer is no longer in business. Applicants in such situations must submit a signed statement with the application explaining why verification cannot be obtained. Requests for waivers of the verification requirement will be decided on a case-by-case basis. Failure to submit the required verification or a request for a waiver at the time of filing application will result in disqualification. Applicants who qualify based on the educational substitution MUST submit a photocopy of their college transcript with their application. Failure to do so will result in disqualification.

HOW TO APPLY: NUMBERED applications will be available at the San Francisco Department of Social Services, 170 Otis Street, between the hours of 7:00 AM and 11:00 AM on ONE DAY ONLY, March 24, 1995. Applications MUST be obtained from DSS. Numbered applications will be distributed on a first come, first served basis. Photocopied applications will not be accepted. Those desiring more than one application must line up again for each application. Completed applications MUST be mailed to: San Francisco Dept. of Social Services, P.O. Box 7988, San Francisco, CA. 94120 Attn. Exam Unit E332 Applications must be postmarked by April 7, 1995. ENVELOPES WILL NOT BE ACCEPTED WITHOUT A POSTMARK. It is the applicant's responsibility to ensure that the envelope is posted by the final filing date. HAND-DELIVERED APPLICATIONS WILL NOT BE ACCEPTED.

NOTE: This examination may be administered in a series. Qualified applicants will be admitted to the first testing group on a first come, first served basis, according to the number stamped on their applications. The cut-off number for admission into the first testing group will be determined after the filing period and will be based on the needs of the Department. Current City employees in class 2903 who indicate their status on the application will be included in the first testing group and do not need to come early but must apply by 11:00 AM.

EXAMINATION:

POINTS

Written Examination: Candidates will be tested to determine their relative knowledge and ability in job related areas. These may include but not be limited to organizational ability, ability to interpret rules and regulations relative to eligibility determination, ability in arithmetic, knowledge of standard office procedures, and written communication ability..... 500

Oral Examination:

Candidates who pass the written exam will be tested by oral examination to determine their relative knowledge and ability levels in job related areas. These may include but not be limited to knowledge of the principles and techniques of interviewing, ability in human relations and oral communication.....500

TOTAL POINTS 1000

NOTES:

1. Qualified candidates will be notified by mail of the exact date, time and location of the examination. Qualified candidates with disabilities who require reasonable accommodation for this examination MUST contact the examination analyst by telephone at 557-5688 (Voice) or if hearing impaired, 775-9484 (TDD) or in writing at the address listed above as soon as possible after being notified that the application has been accepted.
2. A certification rule of three (3) scores will be used for the eligible list resulting from this examination.
3. Some positions may require language proficiency in either Cantonese, Russian, Spanish, Vietnamese or other languages as required. Proficiency in languages in addition to English must be indicated on the application. Candidates who indicate bilingual ability will be required to demonstrate language proficiency prior to appointment to a bilingual position.

Issued: March 24, 1995
Announcement NO.: 060-95
TEAM: DSS (SK)
(415) 557-5688

2903/2905
Combined Entrance
and Promotional

Wendell L. Pryor, Director
Department of Human Resources

557 4908

General information concerning Civil Service Commission employment policies and procedures may be found in the pamphlet entitled "Important Employment Information." This information is part of the terms of all announcements. The pamphlet is available at the Civil Service Information Center at 44 Gough Street, First Floor Lobby. Read the entire announcement and the pamphlet before you fill out your Civil Service application form and submit it for filing.

Attachment 5
1985 HSA
2905 Job Announcement

2/85



CITY AND COUNTY OF San Francisco Employment Opportunity

Apply To- S. F. Department of Social Services COMBINED ENTRANCE AND PROMOTIONAL
170 Otis Street, 5th Floor or Mail To:
D. S. S. Unit #E33
P. O. Box 7988
San Francisco, CA 94120

2905 Senior Eligibility Worker

Salary: Effective 7/1/84 Bi-Weekly; \$704-850 Monthly; \$1531-1849

DATE OF EXAMINATION: Qualified applicants will be notified by mail of the time, date and place to report for the examination.

FINAL FILING DATE: File immediately, receipt of Entrance applications may be closed at any time. The final filing date for Promotional applicants is March 4, 1985.

DUTIES: Under direction, Senior Eligibility Workers perform the more difficult determinations of eligibility for public assistance; assist clients in completing applications and related forms; and make appropriate referrals to social work staff. They also interpret and enforce rules and regulations regarding eligibility for public assistance; make regular contact with clients and representatives of various public and private organizations; maintain detailed records relative to individual eligibility determination and caseload statistics. Workers may function as Carrying or Intake Workers in AFDC, Assistance Food Stamps or CA Unit; may be assigned to specialized functions such as a Quality Control, Overpayments, Collections, Training or Handbook Development. Assignments of these specialized functions may be given to more experienced Senior Eligibility Workers.

REQUIREMENTS:

- 1. One year of verifiable income maintenance experience (eligibility determination) in a county or state administered public assistance program with the experience being at least equivalent to the work performed by Class 2903 Eligibility Worker in S. F. County.

EXAMINATION:

Written examination - Candidates will be tested to determine their relative knowledge, ability and skill levels in job related areas. These may include but not be limited to: knowledge of rules and regulations governing categorical aid programs; knowledge of principles of interviewing; and ability to make difficult eligibility and budget determinations. POINTS
..... Qualifying

Oral examination - Candidates will be interviewed to determine their relative knowledge, ability and skill levels in job related areas. These areas may include, but not be limited to: ability to explain rules, regulations and policies to staff and clients; ability to establish and maintain cooperative working relationships; knowledge of principles of interviewing. 1000

Notes: PLEASE READ CAREFULLY THE FOLLOWING:

- 1. It is each applicant's responsibility to demonstrate that his/her experience meets the requirements.
- 2. Any person who is otherwise qualified and has current permanent, probationary, certified temporary from a list or holdover status with the City and County of San Francisco and has six months of verifiable, satisfactory experience in any class in any status (including non-Civil Service or Limited Tenure appointments) qualifies promotionally. Employees qualifying on a promotional basis are entitled to 60 additional points for seniority and satisfactory performance ratings. Experience must be reported on the application to be credited. Deductions from seniority points will be made for applicable disciplinary actions.

MINORITIES, WOMEN AND DISABLED ARE ENCOURAGED TO APPLY

an Equal Opportunity Employer

3. Promotional Applicants Only: Attach a copy of current (less than 1 year old as of March 4, 1985) Performance Evaluation. This will be used solely to compute City and County service credit. Promotional applicants not submitting copies of his/her performance evaluation will not receive City and County service credit.
4. The computation date by which experience will be evaluated is March 4, 1985.
5. Multiple oral panels may be used because of large numbers of candidates. In these instances, candidates may be randomly assigned to oral boards, and the ratings given by the various panels compared to determine if there are significant differences. If so, ratings may be standardized in order to eliminate differences in scores that can be attributed to the panels rather than to the candidates themselves.
6. Eligibles may waive consideration for temporary or permanent appointment from (2) Notices of Certification; waiver from a third notice will result in the removal of the eligible's name from the list and all other lists in the class.
7. Handicapped applicants should contact us at 557-5577 to advise us of special needs in taking examinations.
8. As a condition of employment in some classifications, employees may be required to join the union or pay a union service fee.
9. The Personnel Department reserves the right to revise the examination plan in order to meet the requirements of law.
10. The Board of Supervisors may establish reasonable and specific residence requirements for employees.
11. Prior to posting, the duration of the eligible list will be determined (not less than two or more than four years after the adoption of such list).

Issued: February 15, 1985
 Announcement No. 0069-85D
 Team: D. S. S.

John J. Walsh
 General Manager, Personnel

IMPORTANT EMPLOYMENT INFORMATION

EQUAL EMPLOYMENT OPPORTUNITY. The City and County of San Francisco is an Equal Opportunity employer. Applicants shall not be favored or discriminated against because of race, religion, sex, national origin, ethnicity, age, physical handicap, political affiliation, sexual orientation, ancestry, marital status, color, medical condition or other non-merit factor.

EXAMINATION ANNOUNCEMENT. Applicants must be guided solely by the provisions of this announcement, including requirements, time periods, and other particulars. Errors may be corrected by posting a notice on the bulletin board at Room 15L City Hall. Unless otherwise noted, applicants must possess the minimum qualifications by the final filing date. This data will be used for computing the rating of City and County service for promotional applicants.

APPEAL PROCEDURE. Written appeals concerning this announcement must be received within seven business days from the original issue date. Petitioners will be notified concerning their appeals. Reconsideration of this ruling will be made only if received by noon of the fifth business day following mailing of the original notification. Following this appeal period, only questions dealing with interpretation of requirements will be considered.

EMPLOYMENT APPLICATION. Applicants must clearly show that they meet all requirements by submitting a complete Employment Application. If education beyond high school or a license other than Drivers License is required, an official transcript or copy must be presented at the time of filing or shortly thereafter. This copy will not be returned. Experience gained in violation of Commission Rules cannot be credited. City employees receive credit for the duties of their classification. They can receive credit for work outside their classification only if their department heads officially assign such work in accordance with Commission Rules. Part-time experience may be used to meet experience requirements (2000 hours equals one year).

ELIGIBLE LISTS. The purpose of an examination is to provide a list of qualified persons eligible for employment. Candidates must be successful in each part of the examination. Candidates are ranked on an Eligible List according to their overall scores in the examination. Separate Eligible Lists are established for each job classification. Unless the announcement specifies otherwise the Eligible List will expire after 4 years and will be used to fill both permanent and temporary vacancies in all Departments.

IDENTIFICATION. All candidates will be required to present identification cards showing their photographs at each part of this examination. Acceptable identification includes a valid driver's license, California Identification Card issued by the Department of Motor Vehicles for non-drivers, a passport, military identification card, or an alien registration card.

LANGUAGE PROFICIENCY. Proficiency in languages in addition to English should be indicated in Item 11 of the application form. Certain positions in a class might require proficiency in a second language as well as English; and only candidates indicating the required proficiency will be called for such positions. Such eligibles will be tested for proficiency in that language.

HANDICAPPED APPLICANTS. Reasonable accommodations will be made so that handicapped applicants may participate in the examination process. Please advise the Personnel Office of special needs in advance of the examination.

CHANGE OF ADDRESS. It is the Applicant's/Eligible's responsibility to file a Change of Address form promptly with the Personnel Department. Failure to do so may result in loss of eligibility.

APPOINTMENT. Each vacancy is filled from among the top three available candidates on the appropriate eligible list. Prior to starting work, all prospective employees are required to pass a medical examination administered by our Civil Service physician. At the time of appointment, all candidates may also be fingerprinted at their own expense. At the time of appointment, all persons must possess a Social Security number. All new employees are required to take the loyalty oath as required by the Constitution of the State of California.

PROBATIONARY PERIOD. After appointment to a permanent position, the employee must serve a probationary period during which the employee must demonstrate the ability to perform the work assigned to the position.

ADDITIONAL INFORMATION. Statement of Policy on Accredited Colleges and Universities and summary sheet concerning Residence Requirements, High School Diploma Substitutes, Veterans Preference and Arrest and Convictions Policy may be obtained at the Personnel Department.

For further explanation concerning any of the above information contact the Personnel Office.

Attachment 6
SEIU Memorandum of Understanding
Out-of-Class/Acting Assignment Pay

325. Work assignments of employees shall not be changed for the sole purpose of evading the requirements of providing acting pay to an employee who would otherwise be eligible.
326. Requests for classification or reclassification review shall not be governed by this provision but shall be submitted to the Civil Service Commission whose determination is final and not subject to the grievance procedure.

Volunteers, SWAP, CAL WORKS, CAAP Workfare, or others not covered by this agreement

327. Employees who supervise or direct the work of volunteers, or CAL WORKS, CAAP Workfare, SWAP workers or other similar programs shall be paid a differential of five percent (5%) above their base hourly rate. (See Article II. Contracting Out, paragraph numbers 135 to 136).

Medi-Cal Screen/Process Premium

328. Employees in class 2903 Eligibility Worker who are assigned to screen and process Medi-Cal applications at San Francisco General Hospital shall receive the rate of pay assigned to Class 2908 Hospital Eligibility Worker. Such assignment shall be certified by the appointing officer of the Department of Public Health and Administrator of San Francisco General Hospital.

Premium Pay for 2940/2944 Court Liaisons

329. The 2940/2944 positions assigned to Court Liaisons Unit shall receive a premium of two and one half percent (2.5%) of their base salary.

Premium Pay for Emergency Response Protective Service Workers

330. The City agrees that because of the complexity of emergency response assignments in the Family & Children's Services Division of the Department of Human Services, Class 2940 Protective Services Workers and Class 2944 Protective Services Worker Supervisors assigned to emergency response positions shall be paid a premium of 5% above their base pay.

Adult Protective Service Unit Premium

331. Adult Protective Service unit employees occupying 2910 Social Worker, 2912 Senior Social Worker, 2914 Social Worker Supervisor positions shall receive a ten percent (10%) premium above their base salary.

Airport Field Officer Training Premium

332. Airport employee(s) in the 9209 Community Police Service Aide, 9212 Airport Safety Officer, 9202 Airport Communications Dispatcher and 1706 Telephone Operator classifications who are assigned by the Appointing Officer or designee to train employees in their respective classifications shall receive a premium of two (\$2.00) dollars per hour above their base wage, for each hour they are assigned as a Field Training Officer.

333. Assignment shall be by seniority among qualified employees. The department shall determine the qualifications of the assignment. The determination of qualifications shall not be arbitrary. The assigned training and evaluations shall be performed in accordance with the standards established by the department.

ARTICLE III – PAY, HOURS AND BENEFITS

Lead Person Premium

314. Employees shall be entitled to a five dollar (\$5.00) per day premium when designated by their supervisor as authorized in writing by the Appointing Officer or designee as a lead person when required to perform a majority of the following duties: plan, design, sketch, layout, detail, estimate, order materials or take the lead on any job when at least two employees are working together and one acts as the lead person.

Underwater Diving Pay

315. Employees shall be paid ten dollars (\$10.00) per hour more than the base hourly rate, exclusive of any additional compensation for other assignments, when assigned and actually engaged in duties and operations requiring underwater diving.

Security Guard

316. When a Security Guard (8202) is assigned to the museums and performs the duties of a Museum Guard (8226), said employee shall receive the rate of pay of a Museum Guard (at a comparable step) for the period of time so assigned and performing appropriate duties for an entire shift.

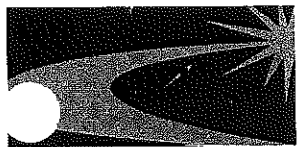
Out Of Class Work

Acting Assignment Pay

317. An employee assigned in writing by the Department Head to perform a substantial portion of the duties and responsibilities of a higher classification shall be entitled to out of class pay after the tenth (10th) work day (within a sixty (60) working-day period) of such an assignment, retroactive to the first (1st) day of the assignment.
318. Employees who believe they have been assigned to do the work of a higher classification, whether in writing or not, and do not receive such pay must file an out of class pay claim with the Department Head within forty-five (45) working days of such alleged assignment.
319. The Department Head or designee shall review the claim and shall either approve and submit the claim for payment, or deny the claim. In cases of denial, the Department Head or designee shall state the reason for denials. Denials may be based on either of the following:
320. 1. The Department Head disagrees that the assignment is out of class or;
321. 2. The Department Head considers the assignment improper, in which case the assignment shall be terminated, but the employee's pay claim will be honored.
322. Denials based on (1) above are appealable through the grievance procedure of this Agreement.
323. Upon written approval by the Appointing Officer, an employee shall be authorized to receive an increase of one salary step above the employee's base salary (except for employees who are at the top step, who shall receive at least five (5) percent more than their base rate) but which does not exceed the maximum step of the salary schedule of the class to which temporarily assigned. Such pay shall be retroactive to the first day of such assignment. Premiums based on percent of salary shall be paid at a rate which includes the out of class pay.
324. Employees shall not normally be required to perform the duties of a higher classification.

**ADDITIONAL INFORMATION SUBMITTED BY
LOCAL 1021 SEIU**

LOCAL 1021



SEIU
Stronger Together

Roxanne Sanchez
President

Crawford Johnson
Region A

Tom Popenuck
Region B

Gary Jimenez
Region C

Larry Bradshaw
Region D

Marcus Williams
Region E

Pamela Holmes-Morton
Secretary

Paul Camarillo
Treasurer

Karen Joubert
Vice President of Representation

abeth Alexander
President of Politics

Ramses Teon-Nichols
Vice President of Organizing

Executive Board

Priscilla Agbunag
Pete Albert
Nancy Atwell
Akbar Bibb
Derrick Boutté
Gina Castillano
Gayle Chadwick
Gregory Correa
Evelyn Curiel
Rhea Davis
Karla Faucett
David Fleming
Nancy Ghanim
Cynthia Landry
Andrea Longoria
Renato Pena
Patricia Reynolds
Mercedes Riggleman
Valoria Russell-Benson
Eric Stern
Renita Terry
Denis Villanueva
Tina Watkins
Wise

Sent via U.S. Mail, Email & Fax (415) 252-3260

January 24, 2014

Jennifer Johnston, Executive Officer
Civil Service Commission
25 Van Ness Avenue, Suite 720
San Francisco, CA 94102

RE: HSA Flexing Issue

Dear Ms. Johnston:

As per your request to provide you with information by today at 5 p.m. pertaining to the flexing issue, please find attached information that could be useful to review for yourself and the committee. I would also like to point out that this issue is not only specific to 2903 Eligibility Workers and 2905 Senior Eligibility Workers from HSA, but also 9702 Employment and Training Specialist 1 and 9703 Employment and Training Specialist 2, 2910 Social Worker and 2912 Senior Social Worker from HSA as well as 8157 Child Support Officer I and 8158 Child Support Officer II.

I have attached copies of the Civil Service Job Announcement, which clearly state that these are "flex-up" positions given to the employee at the time of hire. I have also attached copies of evaluations, where you can see that there is no differentiation between the expected duties and performance of a 2903 and 2905; but they are not being compensated equally.

Here are the Civil Service Rules that have been Violated:

Sec. 111.16 Authorization for Flexible Staffing Program

The Human Resources Director is authorized to establish flexible staffing programs to promote permanent Civil Service employees past the probationary period to higher classes within an occupational series or to another series by methods other than traditional selection procedures. In establishing a flexible staffing program, the Human Resources Director shall consider, among other factors, length of permanent service, performance appraisal ratings, availability of positions, budgetary restrictions, and equal employment opportunity. The specific procedures and qualifications established shall be listed in the flexible staffing examination announcement for the class(es) involved.

113.9.6 Flexible Staffing Personnel Requisitions

A personnel requisition for a permanent vacancy filled by an appointee in accordance with the flexible staffing authority of the Salary Ordinance shall also be valid for subsequent certification for appointment of the same eligible, when qualified, to the class designated on the personnel requisition.

Executive Board Budget & Finance Committee

Theresa Breakfield Kathryn Cavness Tina Diep Richard Greenwood
Doug Marr Julie Meyers Peggy La Rossa Paul Little Nadeen Roach

To: Jennifer Johnston

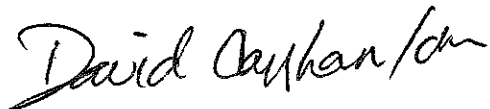
RE: HSA Flexing Issue

Page 2

1/24/14

Please note that we will probably have more information to provide to you at the February 3rd, Civil Service Hearing.

Thank you,

A handwritten signature in black ink that reads "David Canham/cm". The signature is written in a cursive, flowing style.

David Canham
SEIU 1021 Field Director

Attachments

DC/cm

cm:opeiu29afl-cio

City and County of San Francisco



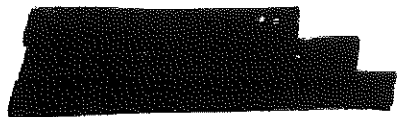
Gavin Newsom, Mayor

Human Services Agency

Department of Human Services
Department of Aging and Adult Services

Trent Rhorer, Executive Director

August 31, 2007



Dear Mr. [REDACTED]:

We are pleased to advise you that you have passed the examination for **Class 2903/2905 Eligibility Worker/Senior Eligibility Worker – Flexible Staffing**. Your scores are shown below.

The certification rule applied to this examination is Rule of Three Scores. Names of eligibles appear on the eligible list in rank order. The duration of your eligibility is 24 months, beginning on the date that the eligible list is adopted.

Raw Score	:	53
ELIGIBLE LIST SCORE	:	904
Rank on the Eligible List	:	4

You may inspect your examination papers between 8:00 a.m. and 4:00 p.m. at the Human Services Agency, Examination Unit, 1650 Mission Street 2nd floor, San Francisco on September 4 -- 6, 2007.

This examination is standardized. The key answers and test questions are **not** subject to inspection or appeal procedures in accordance with Civil Service Rules. Therefore, inspection privileges shall not apply to this examination. However, candidates may inspect their written answer sheet, application, and any additional materials they may have submitted.

Be prepared to present valid identification with your photograph at the time of inspection. You must notify the Certification Unit, Department Human Resources of any change of address.

Human Services Agency

Myrna G. Briones
Senior Personnel Analyst
HSA - Exam Unit
Phone: (415) 557-5688

2903/05 pass ltr



**CITY AND COUNTY OF SAN FRANCISCO
HUMAN SERVICES AGENCY**

PERFORMANCE APPRAISAL REPORT

I. EMPLOYEE IDENTIFICATION INFORMATION

1. NAME LAST NAME: [REDACTED] FIRST NAME: [REDACTED] MIDDLE INITIAL:		
2. JOB CLASS NUMBER AND TITLE CLASS: 2905 TITLE: Sr. Eligibility Worker		
3. STATUS <input checked="" type="checkbox"/> Permanent (PCS) <input type="checkbox"/> Provisional (TPV) <input type="checkbox"/> Permanent Exempt (PEX)		
4. WORK LOCATION & DIVISION 1235 Mission St 4 th floor		
5. DEPARTMENT & PROGRAM County Adult Assistance Program		
6. REASON FOR REPORT <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Program Review Period <input type="checkbox"/> Probationary <input type="checkbox"/> Interim		
7. REVIEW PERIOD (Month/Day/Year) From: 12/04/12 To: 12/04/13	8. PROBATION START AND END DATE (Month/Day/Year) From: N/A To: N/A	

Detailed information about the HSA Performance Appraisal process may be found in the HSA Personnel Procedures Handbook, Section 9-5

II. EXPLANATION OF SECTIONS

- I. **EMPLOYEE IDENTIFICATION INFORMATION** — Basic information about the employee, his/her status, and the review period.
- II. **EXPLANATION OF SECTIONS** — Basic information about what should be included in each section of the Performance Appraisal Report.
- III. **PERFORMANCE RATING STANDARDS** — Description of Performance Rating Standards and listing of their numeric equivalence.
- IV. **JOB DESCRIPTION** — A list of the duties and responsibilities for this position. To be completed prior to the Job Standards Meeting. Refer to the published Position Description as appropriate.
- V. **PERFORMANCE DESCRIPTION AREAS** — Responsibilities and performance standards must include measurable results. Each responsibility should consider the following elements: quantity, quality, time, cost, and safety:

- ◆ Demonstration of HSA values
- ◆ Overall Performance of Job Description
- ◆ Results of Performance Objectives
- ◆ Knowledge Of Job
- ◆ Employee's Strengths
- ◆ Achievements
- ◆ Attendance And Punctuality
- ◆ Quantity Of Work Performed
- ◆ Adaptability To The Work Situation
- ◆ Effectiveness Of Working-With Others
- ◆ Use Of Materials And Equipment
- ◆ Safety
- ◆ Performance Plans
- ◆ Customer Service

In addition to the areas above, the following areas may be addressed for supervisors/managers:

- ◆ Communication
- ◆ Planning
- ◆ Decision Making
- ◆ Directing and Motivating Staff
- ◆ Training and Developing Staff

Supervisors are required to provide an explanation of all ratings.

- VI. **OVERALL PERFORMANCE RATING** — Reporting Supervisor's/Manager's rating of the employee's overall performance during the appraisal review period.

Explanation of Overall Performance Rating — A narrative explanation of the rating of overall performance during the appraisal report review period is required.

- VII. **PROFESSIONAL DEVELOPMENT** — This section is designed to indicate specific activities such as assignments, training, and education that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.

- VIII. **JOB STANDARDS MEETING** — The supervisor, the employee, and the reviewer initial to verify that the Job Standards Meeting has taken place on the date indicated according to the requirements specified in Section 9-5 of the HSA Personnel Procedures Handbook. The reviewer need not participate in the Job Standards meeting with the employee.

- IX. **MID-POINT REVIEW** — The supervisor, the employee, and the reviewer initial to verify that the Mid-Point Review has taken place on the date indicated according to the requirements specified in Section 9-5 of the HSA Personnel Procedures Handbook. The reviewer need not participate in the Mid-Point Review with the employee.

- X. **REPORTING SUPERVISOR/MANAGER** — This is the person who directly supervises the employee's performance.

- XI. **REVIEWER CERTIFICATION** — The Reviewer is generally the individual who supervises the reporting supervisor/manager. The Reviewer is to complete the Certification prior to the Performance Appraisal meeting with the employee.

- XII. **EMPLOYEE STATEMENT** — Employee's opportunity to respond to the PA Report using a checklist, signature and date. Signing the report only certifies that the employee has read it. It does not indicate, unless marked, that the employee agrees with the report.

III. PERFORMANCE RATING STANDARDS

PERFORMANCE RATING STANDARDS and NUMERIC VALUES Use the following to identify employee's level of performance.	
PERFORMANCE RATING	NUMERIC VALUE
OUTSTANDING	NUMERIC VALUE - 5
<p>The Employee:</p> <ul style="list-style-type: none"> • Demonstrates particularly excellent performance that is of such high quality that organizational goals have been achieved that would not have been otherwise. • Demonstrates mastery of technical skills and a thorough understanding of the mission of the organization and has a fundamental impact on the completion of program objectives. • Demonstrates an ability to get the job done well in more than one way while handling difficult and unpredicted problems. • Exerts a major positive influence on management practices, operating procedures and/or program implementation, which contributes substantially to organizational growth and recognition. • Plans for the unexpected and uses alternate ways of reaching goals. Difficult assignments are handled intelligently and effectively. • Has produced an exceptional quantity of work, often ahead of established schedules and with little supervision. • The employee's oral and written communications are exceptionally clear and effective. He/she improves cooperation among participants in the workplace and prevents misunderstandings. Complicated or controversial subjects are presented or explained effectively to a variety of audiences so that desired outcomes are achieved. 	
EXCEEDS STANDARDS	NUMERIC VALUE - 4
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates unusually good performance that exceeds expectations in critical areas and exhibits a sustained support of organizational goals. • Shows a comprehensive understanding of the objectives of the job and the procedures for meeting them. • Plans effectively, improving the quality of management practices, operating procedures, task assignments and/or program activities. • Develops and/or implements workable and cost-effective approaches to meeting organizational goals. • Writes and speaks clearly on difficult subjects to a wide range of audiences and works effectively with others to accomplish organizational objectives. 	

COMPETENT AND EFFECTIVE	NUMERIC VALUE - 3
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates good, sound performance that meets organizational goals. • Generally completes all critical activities in a timely manner and supervisor is kept informed of work issues, alterations and status. • Effectively applies technical skills and organizational knowledge to get the job done. • Successfully carries out regular duties while also handling any difficult special assignments. • Plans and performs work according to organizational priorities and schedules. • Communicates clearly and effectively. 	
DEVELOPMENT NEEDED	NUMERIC VALUE - 2
<p>The Employee's performance shows serious deficiencies that requires correction.</p> <ul style="list-style-type: none"> • The employee's work frequently needs revision or adjustments to meet a minimally successful level. • All assignments are completed, but often require assistance from supervisor and/or peers. • Organizational goals and objectives are met only as a result of close supervision. • On one or more occasions, important work requires unusually close supervision to meet organizational goals or needs so much revision that deadlines were missed or imperiled. <p>The Employee demonstrates:</p> <ul style="list-style-type: none"> • A lack of awareness of policy implications or assignments; • Inappropriate or incomplete use of programs or services; • Circumvention of established procedures, resulting in unnecessary expenditure of time or money; • Reluctance to accept responsibility; • Disorganization in carrying out assignments; • Incomplete understanding of one or more important areas of the field of work; • Unreliable methods for completing assignments; • Lack of clarity in writing and speaking; • Failure to promote team spirit. 	
UNACCEPTABLE	NUMERIC VALUE - 1
<p>The Employee's performance is unacceptable.</p> <ul style="list-style-type: none"> • The quality and quantity of the employee's work are not adequate for the position. • Work products do not meet the minimum requirements expected. <p>The Employee demonstrates:</p> <ul style="list-style-type: none"> • Little or no contribution to organizational goals; • Failure to meet work objectives; • Inattention to organizational priorities and administrative requirements; • Poor work habits resulting in missed work deadlines and/or incomplete work products; • Strained work relationships; • Failure to respond to client needs; • Lack of response to Supervisor's corrective efforts. 	

IV. JOB DESCRIPTION

Working Title

Eligibility Worker

Position Summary

Under CAAP Carrying supervision, performs a variety of technical duties in the review and determination of continuing eligibility of CAAP clients.

Major Responsibilities

Daily Observance of HSA

Knowledge of CAAP Carrying eligibility

- Social Security card requirement.
- VA Verification.
- Referral to other programs.
- Verification of employment, UIB and DIB.
- Student status verification.
- Issuance of temporary ID's.
- Working referrals.
- Refer clients to Social Security agencies.,(THC, etc.).
- Medical referrals.
- ID and Verification and Issuance.
- Residency verification.
- Discontinuance of ineligible clients.
- Refer appropriate clients to SSI unit.
- Explain Remedy and Fair Hearing to clients.
- Resolve "Lost Warrant" or EBT issues.
- Job searches.
- Stabilization clients.
- Referral of Medical clients to Triage/SSI case management.

CAAP Caseload Management:

- Filling of paperwork.
- Referral to other agencies.
- Verification of resources and other sources of income.
- Writing case comments in CalWIN.
- Enter information in CalWIN.
- Maintain case records.
- File case alphabetically.

Determining ongoing CAAP Eligibility

- Determining grant of client.
- Compute and collect overpayments.
- Provide clearance for possible other public assistance and other important information needed.
- Issues timely notices.
- Determine proper grant for CBP clients.

Adhere to Customer Service

Perform quantity of work as assigned:

Responsible for specialized caseloads such as:

- Halfway House
- Income Disregard Program.
- Language cases, such as: Russian, Spanish and Filipino.
- Stabilization
- Pregnant clients.

Follow HSA Vision, Mission and Core values and adhere to Personnel Procedures.

Job Class: 2905	Job Title: CAAP Carrying Eligibility Worker		
Employee Name: Last: [REDACTED]	First: [REDACTED]	MI: [REDACTED]	
Rating Period: (Month/Day/Year) From: 12/04/12 To: 12/04/13			

V. PERFORMANCE DESCRIPTION AREAS

Responsibilities and Performance Standards - Rating and Comments

In the following sections describe the job responsibilities and performance standards.

It may be helpful to reference the Major Responsibilities outlined in the Job Description Section IV.

Select a rating level number and provide an explanation of each performance rating in the "comments" box.

- 1 - Unacceptable
- 2 - Development Needed
- 3 - Competent and Effective
- 4 - Exceeds Standards
- 5 - Outstanding

Sec. V - A. Departmental Requirements

1. Responsibility: Disaster Service Worker Preparedness

Take all necessary steps to prepare yourself for an emergency.

In your capacity as a Disaster Service Worker:

- Provide updated personal contact information to your department so that you can be contacted in the event of an emergency;
- Report in and respond promptly to instructions by the City and/or your department in the event of an emergency;
- Complete the Department of Human Resources Disaster Service Worker and Personal Preparedness Training by the date as determined by the agency;
- Carry out disaster-related work assignments as required.

Yes No

Comments:

Mrs. [REDACTED] completed the Disaster Service Worker Preparedness training as required by HAS, and has also provided updated personal contact information.

2. Responsibility: Commitment to Health & Safety

- Comply with departmental safety and security guidelines and policies.
- Report all occupational injuries, illnesses and near misses to your Supervisor.
- Correct or report unsafe working conditions.
- Ask for assistance or guidance when you do not fully understand the safe way to do your job.
- Work safely and promote and facilitate a safe work environment.

- Not undertake any task, use any tool, or operate equipment unless authorized to do so.
- Attend scheduled Health and Safety training and medical surveillance examinations as required.
- Use and maintain personal protective equipment required for safe job performance.

Yes No

Comments:

Mrs. [REDACTED] has attended all scheduled Health and Safety training as required by this Agency. Up to now she has complied with departmental safety and security guidelines and policies.

3. Responsibility: Upholds Agency Vision, Mission, and Core Values

VISION: San Francisco is a diverse community whose children, youth, families, adults, and seniors are safe, self-sufficient and thriving.

MISSION: The Human Services Agency promotes well-being and self-sufficiency among individuals, families, and communities in San Francisco.

VALUES

- | | |
|---------------|--------------------------|
| ▪ Respect | ▪ Customer Service |
| ▪ Diversity | ▪ Communication |
| ▪ Integrity | ▪ Continuous Improvement |
| ▪ Partnership | |

For a complete description of the Core Values, please visit the HAS Intranet under Vision, Mission & Core Values.

Yes No

Comments:

Mrs. [REDACTED] adheres to the Agency's Vision, Mission, and Core Values as outlined in the Personnel Procedures.

4. Responsibility: Attendance Standards

The Agency has established the following uniform attendance standards to measure employee performance in this area and its corresponding performance evaluation rating in a twelve month period. The Standard in Hours below refers to hours of absence. Absence shall include Sick Leave (sick leave not covered under the FMLA, Workers Compensation, or ADA approved leaves), AWOL, and other unexcused absences from work. Refer to Section 9-8, VI - A, in the Personnel Policy and Procedures Manual for specific details on Attendance.

<u>Standards in Hours</u>	<u>Performance Rating</u>
0 up to and including 32 hours	5 - Outstanding
Over 32 and including 64 hours	4 - Exceeds Standards
Over 64 and including 104 hours	3 - Competent and Effective
Over 104 and including 128 hours	2 - Development Needed (High rate of lateness and/or absence)
Over 128 hours	1 - Unacceptable (Excessive and persistent pattern of lateness and/or absence)

Rating: 1 2 3 4 5

Rating Comments:

During the period covered in this evaluation from 12/04/12 to 12/04/13, Mrs. [redacted] took 88.5 hours of sick leave. According to HSA Personnel Procedures Handbook, over 64 and including 104 hours of sick leave is considered "Competent and Effective".

- Timely processing of on going CAAP eligibility and PAES.
- Maintain Overdue RV's and PEC's within section standard.
- Complete renewals and update PEC's.
- Timely discontinuance of eligible clients.
- Ensure proper benefits issued including, CBP & Stabilization.
- Represent County Fair Hearing.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [redacted] timely processed on going CAAP/PAES/SSIP/STABILIZATION eligibility. She completed her RVs on time and accurately following all of CAAP's rules and regulations. Mrs. Ho updated PEC's and Aid types codes as required. Ineligible clients were promptly discontinued with proper NOA. She made sure that her clients' benefits were issued promptly and on time via EBT, EFT, Direct Deposit or Two Party checks. She did not loose a Fair Hearing during this report period.

3. 3. Responsibility and Performance Standard: Customer Service

- Adhere to CAAP phone policy.
- Follow HSA Vision, Mission, Values.
- Adapt to changing work situations.
- Minimize customer complaints and maximize compliments.
- Attend to clients needs.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [redacted] adhered to the CAAP phone policy when answering the phone and returning audix messages. She also follows the HSA's Vision, Mission and Values. She adapts well to changes and new issues in work situations. She attends to the needs of her sensitive SSIP clients in a courteous and professional manner.

4. Responsibility and Performance Standard: Quantity of work/Motivation

- Perform special assignments. (Home visits, Lead worker Etc.)
- Participate in training for professional and/or personal development.
- Improve performance of unit (monitoring, role model, etc.,)
- Attend & participate in unit meetings and trainings.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] is a specialized worker in the SSIP Program. She is also in charge of the Stabilization caseload. She participated in the different ACA, ADA, CalHEERS, CWEA, IIPP, EFT and 60 Days housing verification training offered by the Department. She is always willing to help her co-workers. Mrs. [REDACTED] attends and participates in Unit Meetings.

VI. Overall Performance Rating

1 - Unacceptable	2 - Development Needed	3 - Competent and Effective	4 - Exceeds Standards	5 - Outstanding
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Explanation of Overall Performance Rating: Mrs. [redacted] continuously applies her knowledge of the CAAP Program with great detail and she strives to provide good customer service.				

VII. Professional Development

This section is provided to indicate specific activities, such as; assignments, training and education, that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.

Comments:

Mrs. [redacted] should continue to attend the different trainings that the Program offers and seek professional advancement.

VIII. Job Standards Meeting

Initials indicate that the Job Standards Meeting has taken place on the date indicated.

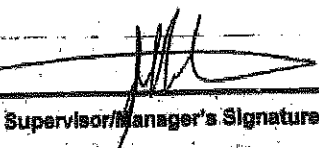
Date: 12/05/13 Initials: Sup: su Emp: ca Reviewer: vn

IX. Mid-Point Review

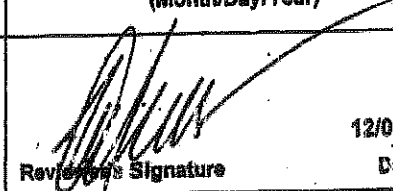
Initials indicate that the Mid-Point Review has taken place on the date indicated.

Date: 06/11/13 Initials: Sup: su Emp: ca Reviewer: vn

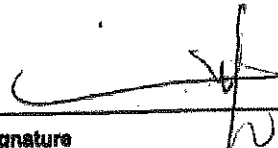
X. Reporting Supervisor/Manager

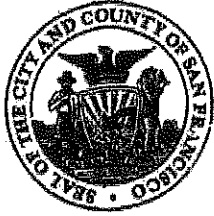
Name, Work Address Supervisor/Manager's Name: (First Name Last Name) Sandra Urbina Work Address: 1235 Mission St. 4th flr.	Class No. and Title 2907 Eligibility Worker Supervisor	Date Report given to Employee 12/05/13 (Month/Day/Year)
	 Supervisor/Manager's Signature	12/05/13 Date

XI. Reviewer Certification

Name, Work Address Name: (First Name, Last Name) Vladimir Rudakov Work Address:	Class No. and Title 0923 Carrying Manager	Date of Conference With Employee 12/05/13 (Month/Day/Year)
	Date of Review (Month/Day/Year)	 Reviewer's Signature 12/05/13 Date

XII. Employee Statement (See Handbook for Statement of Employee Rights)

<p>Employee Statement</p> <p><input checked="" type="checkbox"/> I Agree with this Report</p> <p><input type="checkbox"/> I request a Conference with the Reviewer</p> <p><input type="checkbox"/> Rebuttal Attached*</p> <p><input type="checkbox"/> I Do Not Agree with this Report:</p> <p>Section: _____ Number: _____</p> <p>*NOTE: Employee Rebuttal must be submitted to Personnel within 30 calendar days from the "Date Report given to Employee" on the Performance Appraisal form.</p>	 Signature 12/5/13 Date Certifies I Have Read the Report
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**CITY AND COUNTY OF SAN FRANCISCO
HUMAN SERVICES AGENCY**

PERFORMANCE APPRAISAL REPORT

I. EMPLOYEE IDENTIFICATION INFORMATION

1. NAME LAST NAME: [REDACTED] FIRST NAME: [REDACTED] MIDDLE INITIAL:	
2. JOB CLASS NUMBER AND TITLE CLASS: 2905 TITLE: Sr. Eligibility Worker	
3. STATUS <input checked="" type="checkbox"/> Permanent (PCS) <input type="checkbox"/> Provisional (TPV) <input type="checkbox"/> Permanent Exempt (PEX)	
4. WORK LOCATION & DIVISION 1235 Mission St 4 th floor	
5. DEPARTMENT & PROGRAM County Adult Assistance Program	
6. REASON FOR REPORT <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Program Review Period <input type="checkbox"/> Probationary <input type="checkbox"/> Interim	
7. REVIEW PERIOD (Month/Day/Year) From: 05/15/12 To: 05/15/13	8. PROBATION START AND END DATE (Month/Day/Year) From: N/A To: N/A

Detailed information about the HSA Performance Appraisal process may be found in the HSA Personnel Procedures Handbook, Section 9-5

II. EXPLANATION OF SECTIONS

- I. **EMPLOYEE IDENTIFICATION INFORMATION** — Basic information about the employee, his/her status, and the review period.
- II. **EXPLANATION OF SECTIONS** — Basic information about what should be included in each section of the Performance Appraisal Report.
- III. **PERFORMANCE RATING STANDARDS** — Description of Performance Rating Standards and listing of their numeric equivalence.
- IV. **JOB DESCRIPTION** — A list of the duties and responsibilities for this position. To be completed prior to the Job Standards Meeting. Refer to the published Position Description as appropriate.
- V. **PERFORMANCE DESCRIPTION AREAS** — Responsibilities and performance standards must include measurable results. Each responsibility should consider the following elements: quantity, quality, time, cost, and safety:
 - ◆ Demonstration of HSA values
 - ◆ Overall Performance of Job Description
 - ◆ Results of Performance Objectives
 - ◆ Knowledge Of Job
 - ◆ Employee's Strengths
 - ◆ Achievements
 - ◆ Attendance And Punctuality
 - ◆ Quantity Of Work Performed
 - ◆ Adaptability To The Work Situation
 - ◆ Effectiveness Of Working With Others
 - ◆ Use Of Materials And Equipment
 - ◆ Safety
 - ◆ Performance Plans
 - ◆ Customer Service

In addition to the areas above, the following areas may be addressed for supervisors/managers:

- ◆ Communication
- ◆ Planning
- ◆ Decision Making
- ◆ Directing and Motivating Staff
- ◆ Training and Developing Staff

Supervisors are required to provide an explanation of all ratings.

- VI. **OVERALL PERFORMANCE RATING** — Reporting Supervisor's/Manager's rating of the employee's overall performance during the appraisal review period.

Explanation of Overall Performance Rating — A narrative explanation of the rating of overall performance during the appraisal report review period is required.

- VII. **PROFESSIONAL DEVELOPMENT** — This section is designed to indicate specific activities such as assignments, training, and education that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.

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- X. **REPORTING SUPERVISOR/MANAGER** — This is the person who directly supervises the employee's performance.

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- XII. **EMPLOYEE STATEMENT** — Employee's opportunity to respond to the PA Report using a checklist, signature and date. Signing the report only certifies that the employee has read it. It does not indicate, unless marked, that the employee agrees with the report.

III. PERFORMANCE RATING STANDARDS

PERFORMANCE RATING STANDARDS and NUMERIC VALUES	
Use the following to identify employee's level of performance	
PERFORMANCE RATING	NUMERIC VALUE
OUTSTANDING	NUMERIC VALUE - 5
<p>The Employee:</p> <ul style="list-style-type: none"> • Demonstrates particularly excellent performance that is of such high quality that organizational goals have been achieved that would not have been otherwise. • Demonstrates mastery of technical skills and a thorough understanding of the mission of the organization and has a fundamental impact on the completion of program objectives. • Demonstrates an ability to get the job done well in more than one way while handling difficult and unpredicted problems. • Exerts a major positive influence on management practices, operating procedures and/or program implementation, which contributes substantially to organizational growth and recognition. • Plans for the unexpected and uses alternate ways of reaching goals. Difficult assignments are handled intelligently and effectively. • Has produced an exceptional quantity of work, often ahead of established schedules and with little supervision. • The employee's oral and written communications are exceptionally clear and effective. He/she improves cooperation among participants in the workplace and prevents misunderstandings. Complicated or controversial subjects are presented or explained effectively to a variety of audiences so that desired outcomes are achieved. 	
EXCEEDS STANDARDS	NUMERIC VALUE - 4
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates unusually good performance that exceeds expectations in critical areas and exhibits a sustained support of organizational goals. • Shows a comprehensive understanding of the objectives of the job and the procedures for meeting them. • Plans effectively, improving the quality of management practices, operating procedures, task assignments and/or program activities. • Develops and/or implements workable and cost-effective approaches to meeting organizational goals. • Writes and speaks clearly on difficult subjects to a wide range of audiences and works effectively with others to accomplish organizational objectives. 	

COMPETENT AND EFFECTIVE	NUMERIC VALUE – 3
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates good, sound performance that meets organizational goals. • Generally completes all critical activities in a timely manner and supervisor is kept informed of work issues, alterations and status. • Effectively applies technical skills and organizational knowledge to get the job done. • Successfully carries out regular duties while also handling any difficult special assignments. • Plans and performs work according to organizational priorities and schedules. • Communicates clearly and effectively. 	
DEVELOPMENT NEEDED	NUMERIC VALUE – 2
<p>The Employee's performance shows serious deficiencies that requires correction.</p> <ul style="list-style-type: none"> • The employee's work frequently needs revision or adjustments to meet a minimally successful level. • All assignments are completed, but often require assistance from supervisor and/or peers. • Organizational goals and objectives are met only as a result of close supervision. • On one or more occasions, important work requires unusually close supervision to meet organizational goals or needs so much revision that deadlines were missed or imperiled. <p>The Employee demonstrates:</p> <ul style="list-style-type: none"> • A lack of awareness of policy implications or assignments; • Inappropriate or incomplete use of programs or services; • Circumvention of established procedures, resulting in unnecessary expenditure of time or money; • Reluctance to accept responsibility; • Disorganization in carrying out assignments; • Incomplete understanding of one or more important areas of the field of work; • Unreliable methods for completing assignments; • Lack of clarity in writing and speaking; • Failure to promote team spirit. 	
UNACCEPTABLE	NUMERIC VALUE – 1
<p>The Employee's performance is unacceptable.</p> <ul style="list-style-type: none"> • The quality and quantity of the employee's work are not adequate for the position. • Work products do not meet the minimum requirements expected. <p>The Employee demonstrates:</p> <ul style="list-style-type: none"> • Little or no contribution to organizational goals; • Failure to meet work objectives; • Inattention to organizational priorities and administrative requirements; • Poor work habits resulting in missed work deadlines and/or incomplete work products; • Strained work relationships; • Failure to respond to client needs; • Lack of response to Supervisor's corrective efforts. 	

IV. JOB DESCRIPTION

Working Title

Eligibility Worker

Position Summary

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Major Responsibilities

Daily Observance of HSA

Knowledge of CAAP Carrying eligibility

- Social Security card requirement.
- VA Verification.
- Referral to other programs.
- Verification of employment, UIB and DIB.
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- Issuance of temporary ID's.
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- Medical referrals.
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- Residency verification.
- Discontinuance of ineligible clients.
- Refer appropriate clients to SSI unit.
- Explain Remedy and Fair Hearing to clients.
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CAAP Caseload Management:

- Filling of paperwork.
- Referral to other agencies.
- Verification of resources and other sources of income.
- Writing case comments in CalWIN.
- Enter information in CalWIN.
- Maintain case records.
- File case alphabetically.

Determining ongoing CAAP Eligibility

- Determining grant of client.
- Compute and collect overpayments.
- Provide clearance for possible other public assistance and other important information needed.
- Issues timely notices.
- Determine proper grant for CBP clients.

Adhere to Customer Service

Perform quantity of work as assigned:

Responsible for specialized caseloads such as:

- Halfway House
- Income Disregard Program.
- Language cases, such as: Russian, Spanish and Filipino.
- Stabilization
- Pregnant clients.

Follow HSA Vision, Mission and Core values and adhere to Personnel Procedures.

Job Class: 2905	Job Title: CAAP Carrying Eligibility Worker		
Employee Name: Last: [REDACTED]	First: [REDACTED]	MI:	
Rating Period: (Month/Day/Year)		From: 05/15/12 To: 05/15/13	

V. PERFORMANCE DESCRIPTION AREAS

Responsibilities and Performance Standards - Rating and Comments

In the following sections describe the job responsibilities and performance standards.

It may be helpful to reference the Major Responsibilities outlined in the Job Description Section IV.

Select a rating level number and provide an explanation of each performance rating in the "comments" box.

- 1 - Unacceptable
- 2 - Development Needed
- 3 - Competent and Effective
- 4 - Exceeds Standards
- 5 - Outstanding

Sec. V - A. Departmental Requirements

1. Responsibility: Disaster Service Worker Preparedness

Take all necessary steps to prepare yourself for an emergency.

In your capacity as a Disaster Service Worker:

- Provide updated personal contact information to your department so that you can be contacted in the event of an emergency;
- Report in and respond promptly to instructions by the City and/or your department in the event of an emergency;
- Complete the Department of Human Resources Disaster Service Worker and Personal Preparedness Training by the date as determined by the agency;
- Carry out disaster-related work assignments as required.

Yes No

Comments:

Mrs [REDACTED] completed the Disaster Service Worker Preparedness training as required by HAS, and has also provided updated personal contact information.

2. Responsibility: Commitment to Health & Safety

- Comply with departmental safety and security guidelines and policies.
- Report all occupational injuries, illnesses and near misses to your Supervisor.
- Correct or report unsafe working conditions.
- Ask for assistance or guidance when you do not fully understand the safe way to do your job.
- Work safely and promote and facilitate a safe work environment.

- Not undertake any task, use any tool, or operate equipment unless authorized to do so.
- Attend scheduled Health and Safety training and surveillance examinations as required.
- Use and maintain personal protective equipment required for safe job performance.

Yes No

Comments:

Mrs. [REDACTED] has attended all scheduled Health and Safety trainings as required by this Agency. Up to now she has complied with departmental safety and security.

3. Responsibility: Upholds Agency Vision, Mission, and Core Values

VISION: San Francisco is a diverse community whose children, youth, families, adults, and seniors are safe, self-sufficient and thriving.

MISSION: The Human Services Agency promotes well-being and self-sufficiency among individuals, families, and communities in San Francisco.

VALUES

- | | |
|---------------|--------------------------|
| ▪ Respect | ▪ Customer Service |
| ▪ Diversity | ▪ Communication |
| ▪ Integrity | ▪ Continuous Improvement |
| ▪ Partnership | |

For a complete description of the Core Values, please visit the HAS Intranet under Vision, Mission & Core Values.

Yes No

Comments:

Mrs. [REDACTED] adheres to the Agency's Vision, Mission, and Core Values as outlined in the Personnel Procedures.

4. Responsibility: Attendance Standards

The Agency has established the following uniform attendance standards to measure employee performance in this area and its corresponding performance evaluation rating in a twelve month period. The Standard in Hours below refer to hours of absence. Absence shall include Sick Leave (sick leave not covered under the FMLA, Workers Compensation, or ADA approved leaves), AWOL, and other unexcused absences from work. Refer to Section 9-8, VI. - A, in the Personnel Policy and Procedures Manual for specific details on Attendance.

<u>Standards In Hours</u>	<u>Performance Rating</u>
0 up to and including 32 hours	5 - Outstanding
Over 32 and including 64 hours	4 - Exceeds Standards
Over 64 and including 104 hours	3 - Competent and Effective
Over 104 and including 128 hours	2 - Development Needed (High rate of lateness and/or absence)
Over 128 hours	1 - Unacceptable (Excessive and persistent pattern of lateness and/or absence)

Rating: 1 2 3 4 5

Rating Comments:

During the period covered in this evaluation from 05/15/12 to 05/15/13, Mrs. ~~_____~~ took 47.5 hours of sick leave. According to HAS Personnel Procedures Handbook, over 32 and including 64 hours of sick leave is considered "Exceeds Standards".

Sec. V – B. Individual Job Responsibilities and Performance Standards.

1. Responsibility and Performance Standard: CAAP Case Load Management

- Desk and Time management.
- Narrate case records in CalWIN.
- Schedule appointments.
- Organize personal workspace.
- Complete timely and accurate filling.
- CalWin entries.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] work performance continues to be commendable and she demonstrates excellent desk and time management skills. She utilizes the CALWIN on-line narrative for her cases, which are well and [REDACTED] narrated. She schedules her appointments in correct fashion, and her personal workspace is organized and neat.

2. 2. Responsibility and Performance Standard: Determining on-going Eligibility

- Timely processing of on going CAAP eligibility and PAES.
- Maintain Overdue RV's and PEC's within section standard.
- Complete renewals and update PEC's.
- Timely discontinuance of eligible clients.
- Ensure proper benefits issued including, CBP & Stabilization.
- Represent County Fair Hearing.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] timely processes on going CAAP/PAES eligibility. She completed her RVs on time and accurately by following all CAAP's rules and regulations. She updates PECs and Aid types as required. Ineligible clients were promptly discontinued with proper NOAs. She made sure that her client's benefits were issued properly and on time via EFT, EBT, Direct Deposit, or Two Party Checks. She didn't loose a Fair Hearing during this report period.

3. 3. Responsibility and Performance Standard: Customer Service

- Adhere to CAAP phone policy.
- Follow HSA Vision, Mission, Values.
- Adapt to changing work situations.
- Minimize customer complaints and maximize compliments.
- Attend to clients needs.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] follows the CAAP phone policy when answering the phone and returning audix messages. She also follows HAS' Vision, Mission, and Values as outlined in the Personnel Procedures. She adapts well to changes and new issues in work situations. She attends to the needs of her sensitive SSIP and Spanish clients in a courteous and professional manner.

4. 4. Responsibility and Performance Standard: Quantity of work/Motivation

- Perform special assignments. (Home visits, Lead worker Etc.)
- Participate in training for professional and/or personal development.
- Improve performance of unit (monitoring, role model, etc.,)
- Attend & participate in unit meetings and trainings.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] is a specialized worker in the SSIP Program. She also takes care of the bilingual Spanish case load for the different programs under CAAP (PAES, SSIP, and GA). She participated in the different CWEA, IPP, EFT trainings offered by the Department. She is always willing to help her co-workers. Mrs. [REDACTED] attended and participated in Unit Meetings.

VI. Overall Performance Rating				
1 - Unacceptable	2 - Development Needed	3 - Competent and Effective	4 - Exceeds Standards	5 - Outstanding
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Explanation of Overall Performance Rating: Mrs. ██████ continuously applies her knowledge of the CAAP Program with great detail, and with excellent customer service.				

VII. Professional Development
<i>This section is provided to indicate specific activities, such as; assignments, training and education, that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.</i>

Comments:

Mrs. ██████ should continue to attend the different Trainings that the Program offers, and also seek opportunities for professional advancement.

VIII. Job Standards Meeting

Initials indicate that the Job Standards Meeting has taken place on the date indicated.

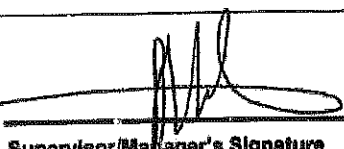
Date: 05/10/13 Initials: Sup: SV Emp: SG Reviewer: W

IX. Mid-Point Review

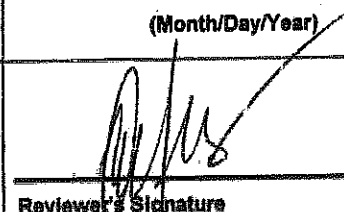
Initials indicate that the Mid-Point Review has taken place on the date indicated.

Date: 11/20/12 Initials: Sup: SV Emp: SG Reviewer: W


X. Reporting Supervisor/Manager

Name, Work Address Supervisor/Manager's Name: (First Name Last Name) Sandra Urbina Work Address: 1235 Mission St. 4th flr.	Class No. and Title 2907 Eligibility Worker Supervisor	Date Report given to Employee 05/10/13 (Month/Day/Year)
		05/10/13
	Supervisor/Manager's Signature	Date

XI. Reviewer Certification

Name, Work Address Name: (First Name, Last Name) Vladimir Rudakov Work Address: 1235 Mission St. 4th flr.	Class No. and Title 0923 Carrying Manager	Date of Conference With Employee 05/10/13 (Month/Day/Year)
	Date of Review 05/10/13 (Month/Day/Year)	
		05/10/13
	Reviewer's Signature	Date

XII. Employee Statement (See Handbook for Statement of Employee Rights)

<p><input checked="" type="checkbox"/> Employee Statement</p> <p><input checked="" type="checkbox"/> I Agree with this Report</p> <p><input type="checkbox"/> I request a Conference with the Reviewer</p> <p><input type="checkbox"/> Rebuttal Attached*</p> <p><input type="checkbox"/> I Do Not Agree with this Report:</p> <p>Section: _____ Number: _____</p> <p>*NOTE: Employee Rebuttal must be submitted to Personnel within 30 calendar days from the "Date Report given to Employee" on the Performance Appraisal form.</p>	<p></p> <p>5/10/13</p> <p>Signature _____ Date _____</p> <p>Certifies I Have Read the Report</p>
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**CITY AND COUNTY OF SAN FRANCISCO
HUMAN SERVICES AGENCY**

PERFORMANCE APPRAISAL REPORT

I. EMPLOYEE IDENTIFICATION INFORMATION

1. NAME LAST NAME: ██████████ FIRST NAME: ██████████ MIDDLE INITIAL: ██████████	
2. JOB CLASS NUMBER AND TITLE CLASS: 2903 TITLE: Eligibility Worker	
3. STATUS <input checked="" type="checkbox"/> Permanent (PCS) <input type="checkbox"/> Provisional (TPV) <input type="checkbox"/> Permanent Exempt (PEX)	
4. WORK LOCATION & DIVISION 1235 Mission, 4 th Floor, San Francisco, CA 94103	
5. DEPARTMENT & PROGRAM Human Services Agency, CAAP Program	
6. REASON FOR REPORT <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Program Review Period <input type="checkbox"/> Probationary <input type="checkbox"/> Interim	
7. REVIEW PERIOD (Month/Day/Year) From: 11/16/12 To: 11/16/2013	8. PROBATION START AND END DATE (Month/Day/Year) From: To:

Detailed information about the HSA Performance Appraisal process may be found in the HSA Personnel Procedures Handbook, Section 9-5

II. EXPLANATION OF SECTIONS

- I. **EMPLOYEE IDENTIFICATION INFORMATION** — Basic information about the employee, his/her status, and the review period.
- II. **EXPLANATION OF SECTIONS** — Basic information about what should be included in each section of the Performance Appraisal Report.
- III. **PERFORMANCE RATING STANDARDS** — Description of Performance Rating Standards and listing of their numeric equivalence.
- IV. **JOB DESCRIPTION** — A list of the duties and responsibilities for this position. To be completed prior to the Job Standards Meeting. Refer to the published Position Description as appropriate.
- V. **PERFORMANCE DESCRIPTION AREAS** – Responsibilities and performance standards must include measurable results. Each responsibility should consider the following elements: quantity, quality, time, cost, and safety:

- ◆ Demonstration of HSA values
- ◆ Overall Performance of Job Description
- ◆ Results of Performance Objectives
- ◆ Knowledge Of Job
- ◆ Employee's Strengths
- ◆ Achievements
- ◆ Attendance And Punctuality
- ◆ Quantity Of Work Performed
- ◆ Adaptability To The Work Situation
- ◆ Effectiveness Of Working With Others
- ◆ Use Of Materials And Equipment
- ◆ Safety
- ◆ Performance Plans
- ◆ Customer Service

In addition to the areas above, the following areas may be addressed for supervisors/managers:

- ◆ Communication
- ◆ Planning
- ◆ Decision Making
- ◆ Directing and Motivating Staff
- ◆ Training and Developing Staff

Supervisors are required to provide an explanation of all ratings.

- VI. **OVERALL PERFORMANCE RATING** — Reporting Supervisor's/Manager's rating of the employee's overall performance during the appraisal review period.
Explanation of Overall Performance Rating — A narrative explanation of the rating of overall performance during the appraisal report review period is required.
- VII. **PROFESSIONAL DEVELOPMENT**— This section is designed to indicate specific activities, such as assignments, training, and education that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.
- VIII. **JOB STANDARDS MEETING** — The supervisor, the employee, and the reviewer initial to verify that the Job Standards Meeting has taken place on the date indicated according to the requirements specified in Section 9-5 of the HSA Personnel Procedures Handbook. The reviewer need not participate in the Job Standards meeting with the employee.
- IX. **MID-POINT REVIEW** — The supervisor, the employee, and the reviewer initial to verify that the Mid-Point Review has taken place on the date indicated according to the requirements specified in Section 9-5 of the HSA Personnel Procedures Handbook. The reviewer need not participate in the Mid-Point Review with the employee.
- X. **REPORTING SUPERVISOR/MANAGER** — This is the person who directly supervises the employee's performance.
- XI. **REVIEWER CERTIFICATION** — The Reviewer is generally the individual who supervises the reporting supervisor/manager. The Reviewer is to complete the Certification prior to the Performance Appraisal meeting with the employee.
- XII. **EMPLOYEE STATEMENT** – Employee's opportunity to respond to the PA Report using a checklist, signature and date. Signing the report only certifies that the employee has read it. It does not indicate, unless marked, that the employee agrees with the report.

III. PERFORMANCE RATING STANDARDS

PERFORMANCE RATING STANDARDS and NUMERIC VALUES Use the following to identify employee's level of performance	
PERFORMANCE RATING	NUMERIC VALUE
OUTSTANDING	NUMERIC VALUE – 5
<p>The Employee:</p> <ul style="list-style-type: none"> • Demonstrates particularly excellent performance that is of such high quality that organizational goals have been achieved that would not have been otherwise. • Demonstrates mastery of technical skills and a thorough understanding of the mission of the organization and has a fundamental impact on the completion of program objectives. • Demonstrates an ability to get the job done well in more than one way while handling difficult and unpredicted problems. • Exerts a major positive influence on management practices, operating procedures and/or program implementation, which contributes substantially to organizational growth and recognition. • Plans for the unexpected and uses alternate ways of reaching goals. Difficult assignments are handled intelligently and effectively. • Has produced an exceptional quantity of work, often ahead of established schedules and with little supervision. • The employee's oral and written communications are exceptionally clear and effective. He/she improves cooperation among participants in the workplace and prevents misunderstandings. Complicated or controversial subjects are presented or explained effectively to a variety of audiences so that desired outcomes are achieved. 	
EXCEEDS STANDARDS	NUMERIC VALUE – 4
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates unusually good performance that exceeds expectations in critical areas and exhibits a sustained support of organizational goals. • Shows a comprehensive understanding of the objectives of the job and the procedures for meeting them. • Plans effectively, improving the quality of management practices, operating procedures, task assignments and/or program activities. • Develops and/or implements workable and cost-effective approaches to meeting organizational goals. • Writes and speaks clearly on difficult subjects to a wide range of audiences and works effectively with others to accomplish organizational objectives. 	

COMPETENT AND EFFECTIVE	NUMERIC VALUE – 3
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates good, sound performance that meets organizational goals. • Generally completes all critical activities in a timely manner and supervisor is kept informed of work issues, alterations and status. • Effectively applies technical skills and organizational knowledge to get the job done. • Successfully carries out regular duties while also handling any difficult special assignments. • Plans and performs work according to organizational priorities and schedules. • Communicates clearly and effectively. 	
DEVELOPMENT NEEDED	NUMERIC VALUE – 2
<p>The Employee's performance shows serious deficiencies that requires correction.</p> <ul style="list-style-type: none"> • The employee's work frequently needs revision or adjustments to meet a minimally successful level. • All assignments are completed, but often require assistance from supervisor and/or peers. • Organizational goals and objectives are met only as a result of close supervision. • On one or more occasions, important work requires unusually close supervision to meet organizational goals or needs so much revision that deadlines were missed or imperiled. <p>The Employee demonstrates:</p> <ul style="list-style-type: none"> • A lack of awareness of policy implications or assignments; • Inappropriate or incomplete use of programs or services; • Circumvention of established procedures, resulting in unnecessary expenditure of time or money; • Reluctance to accept responsibility; • Disorganization in carrying out assignments; • Incomplete understanding of one or more important areas of the field of work; • Unreliable methods for completing assignments; • Lack of clarity in writing and speaking; • Failure to promote team spirit. 	
UNACCEPTABLE	NUMERIC VALUE – 1
<p>The Employee's performance is unacceptable.</p> <ul style="list-style-type: none"> • The quality and quantity of the employee's work are not adequate for the position. • Work products do not meet the minimum requirements expected. <p>The Employee demonstrates:</p> <ul style="list-style-type: none"> • Little or no contribution to organizational goals; • Failure to meet work objectives; • Inattention to organizational priorities and administrative requirements; • Poor work habits resulting in missed work deadlines and/or incomplete work products; • Strained work relationships; • Failure to respond to client needs; • Lack of response to Supervisor's corrective efforts. 	

IV. JOB DESCRIPTION

Working Title
Eligibility Worker
Position Summary
Under CAAP Carrying supervision, performs a variety of technical duties in the review and determination of continuing eligibility of CAAP clients.
Major Responsibilities
Daily Observance of HSA
Knowledge of CAAP Carrying eligibility
<ul style="list-style-type: none">• Social Security card requirement.• VA Verification.• Referral to other programs.• Verification of employment, UIB and DIB.• Student status verification.• Issuance of temporary ID's.• Working referrals.• Refer clients to Social Security agencies.,(THC, etc.).• Medical referrals.• ID and Verification and issuance.• Residency verification.• Discontinuance of ineligible clients.• Refer appropriate clients to SSI unit.• Explain Remedy and Fair Hearing to clients.• Resolve "Lost Warrant" or EBT issues.• Job searches.• Stabilization clients.• Referral of Medical clients to Triage/SSI case management.
CAAP Caseload Management:
<ul style="list-style-type: none">• Filling of paperwork.• Referral to other agencies.• Verification of resources and other sources of income.• Writing case comments in CalWIN.• Enter information in CalWIN.• Maintain case records.• File case alphabetically.

Determining ongoing CAAP Eligibility

- Determining grant of client.
- Compute and collect overpayments.
- Provide clearance for possible other public assistance and other important information needed.
- Issues timely notices.
- Determine proper grant for CBP clients.

Adhere to Customer Service

Perform quantity of work as assigned:

Responsible for specialized caseloads such as:

- Halfway House
- Income Disregard Program.
- Language cases, such as: Russian, Spanish and Filipino.
- Stabilization
- Pregnant clients.

Follow HSA Vision, Mission and Core values and adhere to Personnel Procedures.

Job Class: 2903	Job Title: CAAP Carrying Eligibility Worker		
Employee Name: Last: [REDACTED]	First: [REDACTED]	MI:	
Rating Period: (Month/Day/Year)		From: 11/16/12	To: 11/16/13

V. PERFORMANCE DESCRIPTION AREAS

Responsibilities and Performance Standards - Rating and Comments

In the following sections describe the job responsibilities and performance standards.

It may be helpful to reference the Major Responsibilities outlined in the Job Description Section IV.

Select a rating level number and provide an explanation of each performance rating in the "comments" box.

- 1 – Unacceptable
- 2 – Development Needed
- 3 – Competent and Effective
- 4 – Exceeds Standards
- 5 – Outstanding

Sec. V – A. Departmental Requirements

1. Responsibility: Disaster Service Worker Preparedness

Take all necessary steps to prepare yourself for an emergency.

In your capacity as a Disaster Service Worker:

- Provide updated personal contact information to your department so that you can be contacted in the event of an emergency;
- Report in and respond promptly to instructions by the City and/or your department in the event of an emergency;
- Complete the Department of Human Resources Disaster Service Worker and Personal Preparedness Training by the date as determined by the agency;
- Carry out disaster-related work assignments as required.

Yes No

Comments:

Mr. [REDACTED] attended the Disaster Service Training and gained the necessary skills to perform related assignment if needed.

2. Responsibility: Commitment to Health & Safety

- Comply with departmental safety and security guidelines and policies.
- Report all occupational injuries, illnesses and near misses to your Supervisor.
- Correct or report unsafe working conditions.

- Ask for assistance or guidance when you do not fully understand the safe way to do your job.
- Work safely and promote and facilitate a safe work environment.
- Not undertake any task, use any tool, or operate equipment unless authorized to do so.
- Attend scheduled Health and Safety training and medical surveillance examinations as required.
- Use and maintain personal protective equipment required for safe job performance.

Yes No

Comments:

Mr. [REDACTED] has been in compliance with personnel procedures and guidelines.

3. Responsibility: Upholds Agency Vision, Mission, and Core Values

VISION: San Francisco is a diverse community whose children, youth, families, adults, and seniors are safe, self-sufficient and thriving.

MISSION: The Human Services Agency promotes well-being and self-sufficiency among individuals, families, and communities in San Francisco.

VALUES

- | | |
|---------------|--------------------------|
| ▪ Respect | ▪ Customer Service |
| ▪ Diversity | ▪ Communication |
| ▪ Integrity | ▪ Continuous Improvement |
| ▪ Partnership | |

For a complete description of the Core Values, please visit the HAS Intranet under [Vision, Mission & Core Values](#).

Yes No

Comments:

Mr. [REDACTED] provides excellent customer service to the clients that we serve. He is mindful of the Agency's vision, mission and core values.

4. Responsibility: Attendance Standards

The Agency has established the following uniform attendance standards to measure employee performance in this area and its corresponding performance evaluation rating in a twelve month period. The Standard in Hours below refers to hours of absence. Absence shall include Sick Leave (sick leave not covered under the FMLA, Workers Compensation, or ADA approved leaves), AWOL, and other unexcused absences from work. Refer to Section 9-8, VI. - A, in the Personnel Policy and Procedures Manual for specific details on Attendance.

<u>Standards In Hours</u>	<u>- Performance Rating</u>
0 up to and including 32 hours	- 5 – Outstanding
Over 32 and including 64 hours	- 4 – Exceeds Standards
Over 64 and including 104 hours	- 3 – Competent and Effective
Over 104 and including 128 hours	- 2 – Development Needed (High rate of lateness and/or absence)
Over 128 hours	- 1 – Unacceptable (Excessive and persistent pattern of lateness and/or absence)

Rating: 1 2 3 4 5

Rating Comments:

Mr. █████ used a total of 47 hours of sick leave for the 12 month period that he is being evaluated. Time used falls under exceeds standard rating.

Sec. V – B. Individual Job Responsibilities and Performance Standards.

1. Responsibility and Performance Standard: KNOWLEDGE

Maintaining eligible clients in active status.

- Residency verification
- ID, SSC, BC
- Verification of earned and unearned income
- Resolve "Lost Warrants" or EBT problems.
- SSI application verification

Discontinuing Ineligible Clients.

- FRED and SIU referrals.
- Referral to other programs – Food Stamps, Medical, CAPI.
- Explaining Remedy and Fair Hearings to Clients.

Monitoring Employability Requirements:

- Student Status
- Referral to other CAAP Units (PAES, GA & SSIP)
- DPW
- Job search
- Triage & Dr. referrals

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] knowledge with the CAAP eligibility rules and regulations has improved and he continues to strengthen his skills and apply to his day to day job responsibilities. He maintains his caseload with great attention to details. Mr. [REDACTED] takes timely action when notification is received which includes; workfare AWOL, missed IGEP/GEPS, TWC failures and non-compliance with PCS. Mr. [REDACTED] monitors employability effectively and makes referral as needed.

2. Responsibility and Performance Standard: CAAP Case Load Management

- Desk and Time management.
- Narrate case records in CalWIN.
- Schedule appointments.
- Organize personal workspace.
- Complete timely and accurate filling.
- CalWIN entries.

Rating: 1 2 3 4 5

Rating Comments:

Mr. █████ managed his time effectively. He completes reports and requests timely with no reminders. When he has a planned vacation he ensures that he processed his RV's and take needed actions which makes it very helpful for his co-workers. His narratives are concise and complete. Mr. █████ workspace is organized.

3. Responsibility and Performance Standard: Determining on-going Eligibility

- Timely processing of on going CAAP eligibility and PAES.
- Maintain Overdue RV's and PEC's within section standard.
- Complete renewals and update PEC's.
- Timely discontinuance of eligible clients.
- Ensure proper benefits issued including, CBP & Stabilization.
- Represent County Fair Hearing.

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] ensures that RV's are schedule timely and required forms are mailed prior to RV appointment. He is also mindful in requesting IEVS report prior to RV's. PEC's are updated. Discontinuance notices are sent in compliance with program timeframes. Mr. [REDACTED] prepares necessary documentation prior to schedule fair hearings and follows the timeline to discuss case with supervisor. All fair hearings that Mr. [REDACTED] represented have all been ruled in favor of the county.

4. Responsibility and Performance Standard: Customer Service

- Adhere to CAAP phone policy.
- Follow HSA Vision, Mission, Values.
- Adapt to changing work situations.
- Minimize customer complaints and maximize compliments.
- Attend to clients needs.

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] has excellent customer service skills. Mr. [REDACTED] interprets and communicates relevant regulation and requirement thus minimizing customer complaints. He is respectful, courteous, and professional to all internal and external customers that includes clients, co-workers and outside agency personnel. Mr. [REDACTED] returns telephone calls as soon as possible but no later than 24 hours.

5. Responsibility and Performance Standard: Quantity of work/Motivation

- Perform special assignments. (Home visits, Lead worker Etc.)
- Participate in training for professional and/or personal development.
- Improve performance of unit (monitoring, role model, etc..)
- Attend & participate in unit meetings and trainings.

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] is now the Lead Worker and has been doing an excellent job. Mr. [REDACTED] is a team player. He often times volunteer to meet with a client when other worker has a very tight schedule. He constantly distributes the 2125 forms even if he is not the duty worker of the day. Mr. [REDACTED] attends Unit meeting and shares his input to improve the process in serving our clients. Mr. [REDACTED] also volunteers for the Homeless Connect project.

VI. Overall Performance Rating

1 - Unacceptable	2 - Development Needed	3 - Competent and Effective	4 - Exceeds Standards	5 - Outstanding
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Explanation of Overall Performance Rating: Mr. [REDACTED] has strengthened his eligibility knowledge. He is very organized and managed his time effectively. He has been a good influence and instrumental in maintaining the cohesiveness of the unit.

VII. Professional Development

This section is provided to indicate specific activities, such as; assignments, training and education, that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.

Comments:

Mr. [REDACTED] will continue to refer to the Handbook. Review "How to's" to build up on his CALWIN skills and utilize other tools available to enhance further his eligibility knowledge.

VIII. Job Standards Meeting

Initials indicate that the Job Standards Meeting has taken place on the date indicated.

Date: 1/22/13

Initials: Sup: fab Emp: EP Reviewer: W

IX. Mid-Point Review

Initials indicate that the Mid-Point Review has taken place on the date indicated.

Date: 5/15/13

Initials: Sup: fab Emp: EP Reviewer: W

X. Reporting Supervisor/Manager

<p>Name, Work Address</p> <p>Supervisor/Manager's Name: (First Name Last Name)</p> <p>Fidela Bulaclac</p> <p>Work Address:</p> <p>1235 Mission St., 4th Flr. San Francisco, CA 94103</p>	<p>Class No. and Title</p> <p>2907 Eligibility Worker Supervisor</p> <p><i>Fidela Bulaclac</i></p> <p>Supervisor/Manager's Signature</p>	<p>Date Report given to Employee</p> <p>(Month/Day/Year)</p> <p>11/12/13</p> <p>Date</p>
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XI. Reviewer Certification

<p>Name, Work Address</p> <p>Name: (First Name , Last Name)</p> <p>Vladimir Rudakov</p> <p>Work Address:</p> <p>1235 Mission St., 4th Flr. San Francisco, CA 94103</p>	<p>Class No. and Title</p> <p>Manager</p> <p>Date of Review</p> <p>(Month/Day/Year)</p>	<p>Date of Conference With Employee</p> <p>(Month/Day/Year)</p> <p><i>[Signature]</i></p> <p>11/13/13</p> <p>Reviewer's Signature Date</p>
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XII. Employee Statement (See Handbook for Statement of Employee Rights)

<p>Employee Statement</p> <p><input checked="" type="checkbox"/> I Agree with this Report</p> <p><input type="checkbox"/> I request a Conference with the Reviewer</p> <p><input type="checkbox"/> Rebuttal Attached*</p> <p><input type="checkbox"/> I Do Not Agree with this Report:</p> <p>Section: _____ Number: _____</p> <p>*NOTE: Employee Rebuttal must be submitted to Personnel within 30 calendar days from the "Date Report given to Employee" on the Performance Appraisal form.</p>	<p><i>[Signature]</i></p> <p>11/12/13</p> <p>Signature Date</p> <p>Certifies I Have Read the Report</p>
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**CITY AND COUNTY OF SAN FRANCISCO
HUMAN SERVICES AGENCY**

PERFORMANCE APPRAISAL REPORT

I. EMPLOYEE IDENTIFICATION INFORMATION

1. NAME LAST NAME: ██████ FIRST NAME: ██████ MIDDLE INITIAL: ██████	
2. JOB CLASS NUMBER AND TITLE CLASS: 2905 TITLE: Sr. Eligibility Worker	
3. STATUS <input checked="" type="checkbox"/> Permanent (PCS) <input type="checkbox"/> Provisional (TPV) <input type="checkbox"/> Permanent Exempt (PEX)	
4. WORK LOCATION & DIVISION 1235 Mission, 4 th Floor, San Francisco, CA 94103	
5. DEPARTMENT & PROGRAM Human Services Agency, CAAP Program	
6. REASON FOR REPORT <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Program Review Period <input type="checkbox"/> Probationary <input type="checkbox"/> Interim	
7. REVIEW PERIOD (Month/Day/Year) From: 01/10/13 To: 01/10/14	8. PROBATION START AND END DATE (Month/Day/Year) From: To:

Detailed information about the HSA Performance Appraisal process may be found in the HSA Personnel Procedures Handbook, Section 9-5

II. EXPLANATION OF SECTIONS

- I. **EMPLOYEE IDENTIFICATION INFORMATION** — Basic information about the employee, his/her status, and the review period.
- II. **EXPLANATION OF SECTIONS** — Basic information about what should be included in each section of the Performance Appraisal Report.
- III. **PERFORMANCE RATING STANDARDS** — Description of Performance Rating Standards and listing of their numeric equivalence.
- IV. **JOB DESCRIPTION** — A list of the duties and responsibilities for this position. To be completed prior to the Job Standards Meeting. Refer to the published Position Description as appropriate.
- V. **PERFORMANCE DESCRIPTION AREAS** — Responsibilities and performance standards must include measurable results. Each responsibility should consider the following elements: quantity, quality, time, cost, and safety:

- | | |
|--|--|
| ◆ Demonstration of HSA values | ◆ Quantity Of Work Performed |
| ◆ Overall Performance of Job Description | ◆ Adaptability To The Work Situation |
| ◆ Results of Performance Objectives | ◆ Effectiveness Of Working With Others |
| ◆ Knowledge Of Job | ◆ Use Of Materials And Equipment |
| ◆ Employee's Strengths | ◆ Safety |
| ◆ Achievements | ◆ Performance Plans |
| ◆ Attendance And Punctuality | ◆ Customer Service |

In addition to the areas above, the following areas may be addressed for supervisors/managers:

- | | | |
|----------------------------------|---------------------------------|-------------------|
| ◆ Communication | ◆ Planning | ◆ Decision Making |
| ◆ Directing and Motivating Staff | ◆ Training and Developing Staff | |

Supervisors are required to provide an explanation of all ratings.

- VI. **OVERALL PERFORMANCE RATING** — Reporting Supervisor's/Manager's rating of the employee's overall performance during the appraisal review period.
Explanation of Overall Performance Rating — A narrative explanation of the rating of overall performance during the appraisal report review period is required.
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- X. **REPORTING SUPERVISOR/MANAGER** — This is the person who directly supervises the employee's performance.
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- XII. **EMPLOYEE STATEMENT** — Employee's opportunity to respond to the PA Report using a checklist, signature and date. Signing the report only certifies that the employee has read it. It does not indicate, unless marked, that the employee agrees with the report.

III. PERFORMANCE RATING STANDARDS

PERFORMANCE RATING STANDARDS and NUMERIC VALUES Use the following to identify employee's level of performance	
PERFORMANCE RATING	NUMERIC VALUE
OUTSTANDING	NUMERIC VALUE - 5
<p>The Employee:</p> <ul style="list-style-type: none"> • Demonstrates particularly excellent performance that is of such high quality that organizational goals have been achieved that would not have been otherwise. • Demonstrates mastery of technical skills and a thorough understanding of the mission of the organization and has a fundamental impact on the completion of program objectives. • Demonstrates an ability to get the job done well in more than one way while handling difficult and unpredicted problems. • Exerts a major positive influence on management practices, operating procedures and/or program implementation, which contribute substantially to organizational growth and recognition. • Plans for the unexpected and uses alternate ways of reaching goals. Difficult assignments are handled intelligently and effectively. • Has produced an exceptional quantity of work, often ahead of established schedules and with little supervision. • The employee's oral and written communications are exceptionally clear and effective. He/she improves cooperation among participants in the workplace and prevents misunderstandings. Complicated or controversial subjects are presented or explained effectively to a variety of audiences so that desired outcomes are achieved. 	
EXCEEDS STANDARDS	NUMERIC VALUE - 4
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates unusually good performance that exceeds expectations in critical areas and exhibits a sustained support of organizational goals. • Shows a comprehensive understanding of the objectives of the job and the procedures for meeting them. • Plans effectively, improving the quality of management practices, operating procedures, task assignments and/or program activities. • Develops and/or implements workable and cost-effective approaches to meeting organizational goals. • Writes and speaks clearly on difficult subjects to a wide range of audiences and works effectively with others to accomplish organizational objectives. 	

COMPETENT AND EFFECTIVE	NUMERIC VALUE - 3
<p>The Employee</p> <ul style="list-style-type: none"> • Demonstrates good, sound performance that meets organizational goals. • Generally completes all critical activities in a timely manner and supervisor is kept informed of work issues, alterations and status. • Effectively applies technical skills and organizational knowledge to get the job done. • Successfully carries out regular duties while also handling any difficult special assignments. • Plans and performs work according to organizational priorities and schedules. • Communicates clearly and effectively. 	
DEVELOPMENT NEEDED	NUMERIC VALUE - 2
<p>The Employee's performance shows serious deficiencies that requires correction.</p> <ul style="list-style-type: none"> • The employee's work frequently needs revision or adjustments to meet a minimally successful level. • All assignments are completed, but often require assistance from supervisor and/or peers. • Organizational goals and objectives are met only as a result of close supervision. • On one or more occasions, important work requires unusually close supervision to meet organizational goals or needs so much revision that deadlines were missed or imperiled. <p>The Employee demonstrates:</p> <ul style="list-style-type: none"> • A lack of awareness of policy implications or assignments; • Inappropriate or incomplete use of programs or services; • Circumvention of established procedures, resulting in unnecessary expenditure of time or money; • Reluctance to accept responsibility; • Disorganization in carrying out assignments; • Incomplete understanding of one or more important areas of the field of work; • Unreliable methods for completing assignments; • Lack of clarity in writing and speaking; • Failure to promote team spirit. 	
UNACCEPTABLE	NUMERIC VALUE - 1
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IV. JOB DESCRIPTION

Working Title

Eligibility Worker

Position Summary

Under CAAP Carrying supervision, performs a variety of technical duties in the review and determination of continuing eligibility of CAAP clients.

Major Responsibilities

Daily Observance of HSA

Knowledge of CAAP Carrying eligibility

- Social Security card requirement.
- VA Verification.
- Referral to other programs.
- Verification of employment, UIB and DIB.
- Student status verification.
- Issuance of temporary ID's.
- Working referrals.
- Refer clients to Social Security agencies.,(THC, etc.).
- Medical referrals.
- ID and Verification and issuance.
- Residency verification.
- Discontinuance of ineligible clients.
- Refer appropriate clients to SSI unit.
- Explain Remedy and Fair Hearing to clients.
- Resolve "Lost Warrant" or EBT issues.
- Job searches.
- Stabilization clients.
- Referral of Medical clients to Triage/SSI case management.

CAAP Caseload Management:

- Filling of paperwork.
- Referral to other agencies.
- Verification of resources and other sources of income.
- Writing case comments in CalWIN.
- Enter information in CalWIN.
- Maintain case records.
- File case alphabetically.

Determining ongoing CAAP Eligibility

- Determining grant of client.
- Compute and collect overpayments.
- Provide clearance for possible other public assistance and other important information needed.
- Issues timely notices.
- Determine proper grant for CBP clients.

Adhere to Customer Service

Perform quantity of work as assigned:

Responsible for specialized caseloads such as:

- Halfway House
- Income Disregard Program.
- Language cases, such as: Russian, Spanish and Filipino.
- Stabilization
- Pregnant clients.

Follow HSA Vision, Mission and Core values and adhere to Personnel Procedures.

Job Class: 2905	Job Title: Senior CAAP Carrying Eligibility Worker
Employee Name: ██████████	MI: ██████████
Rating Period: (Month/Day/Year) From 01/10/13 thru 01/10/14	

V. PERFORMANCE DESCRIPTION AREAS

Responsibilities and Performance Standards - Rating and Comments

In the following sections describe the job responsibilities and performance standards.

It may be helpful to reference the Major Responsibilities outlined in the Job Description Section IV.

Select a rating level number and provide an explanation of each performance rating in the "comments" box.

- 1 - Unacceptable
- 2 - Development Needed
- 3 - Competent and Effective
- 4 - Exceeds Standards
- 5 - Outstanding

Sec. V - A. Departmental Requirements

1. Responsibility: Disaster Service Worker Preparedness

Take all necessary steps to prepare yourself for an emergency.

In your capacity as a Disaster Service Worker:

- Provide updated personal contact information to your department so that you can be contacted in the event of an emergency;
- Report in and respond promptly to instructions by the City and/or your department in the event of an emergency;
- Complete the Department of Human Resources Disaster Service Worker and Personal Preparedness Training by the date as determined by the agency;
- Carry out disaster-related work assignments as required.

Yes No

Comments:

Mrs. ██████████ has maintained her personal contact information up-to-date for events of emergency.

2. Responsibility: Commitment to Health & Safety

- Comply with departmental safety and security guidelines and policies.
- Report all occupational injuries, illnesses and near misses to your Supervisor.
- Correct or report unsafe working conditions.
- Ask for assistance or guidance when you do not fully understand the safe way to do your job.
- Work safely and promote and facilitate a safe work environment.
- Not undertake any task, use any tool, or operate equipment unless authorized to do so.
- Attend scheduled Health and Safety training and medical surveillance examinations as required.
- Use and maintain personal protective equipment required for safe job performance.

Yes No

Comments:

Mrs. [REDACTED] has maintained a safe and secured working condition in her work area.

She has actively participated in the following training provided by the Department:

IIPP 3rd Quarter 2012 Training: Preparing for Seasonal Flu/

Practicing Healthy Habits, December 13, 2012

IIPP 1st Quarter 2013 Training: Medical Emergencies: What to Do and What not to Do?
April 17, 2013

IIPP 2nd Quarter 2013 Training: Five Steps to Improve your Office Ergonomics

July 19, 2013

IIPP 3rd Quarter 2013 Training: Fire Prevention and Safety at Home and at Work
December 5, 2013

2. Responsibility: Upholds Agency Vision, Mission, and Core Values

VISION: San Francisco is a diverse community whose children, youth, families, adults, and seniors are safe, self-sufficient and thriving.

MISSION: The Human Services Agency promotes well-being and self-sufficiency among individuals, families, and communities in San Francisco.

VALUES

- Respect
- Diversity
- Integrity
- Partnership
- Customer Service
- Communication
- Continuous Improvement

For a complete description of the Core Values, please visit the HAS Intranet under Vision, Mission & Core Values.

Yes No

Comments:

Mrs. [REDACTED] follows HSA Vision, Mission and Core values and adheres to Personnel Procedures.

4. Responsibility: Attendance Standards

The Agency has established the following uniform attendance standards to measure employee performance in this area and its corresponding performance evaluation rating in a twelve month period. The Standard in Hours below refers to hours of absence. Absence shall include Sick Leave (sick leave not covered under the FMLA, Workers Compensation, or ADA approved leaves), AWOL, and other unexcused absences from work. Refer to Section 9-5, VI. - A, in the Personnel Policy and Procedures Manual for specific details on Attendance.

<u>Standards in Hours</u>	<u>Performance Rating</u>
0 up to and including 32 hours	5 - Outstanding
Over 32 and including 64 hours	4 - Exceeds Standards
Over 64 and including 104 hours	3 - Competent and Effective
Over 104 and including 128 hours	2 - Development Needed (High rate of lateness and/or absence)
Over 128 hours	1 - Unacceptable (Excessive and persistent pattern of lateness and/or absence)

Rating: 1 2 3 4 5

Rating Comments:

During the report period from 01/10/13 through 01/10/14, Mrs. ██████ took a total of 25 hours sick leave. According to the DHS Personnel Handbook on Attendance, this is considered Outstanding.

Sec. V – B. Individual Job Responsibilities and Performance Standards.

1. Responsibility and Performance Standard: KNOWLEDGE

Maintaining eligible clients in active status.

- Residency verification
- ID, SSC, BC
- Verification of earned and unearned income
- Resolve "Lost Warrants" or EBT problems.
- SSI application verification

Discontinuing Ineligible Clients.

- FRED and SIU referrals.
- Referral to other programs – Food Stamps, Medical, CAPI.
- Explaining Remedy and Fair Hearings to Clients.

Monitoring Employability Requirements:

- Student Status
- Referral to other CAAP Units (PAES, GA & SSIP)
- DPW
- Job search
- Triage & Dr. referrals

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] handles GA cases. Mrs. [REDACTED] reviews her cases coming from Intake as well as transfer cases, making sure she understands, exhibits and applies basic rules, regulations, policies and procedures of the Program.

Mrs. [REDACTED] also monitors new procedures especially her clients employability status and refers them to triage when due or necessary. She transfers cases to other CAAP units such as GA, SSIP or Specialized Unit according to program guidelines.

Mrs. [REDACTED] has managed her time well. She sent notices in a timely manner. She reviews AWOL notices, TWC reports, file documents in correct folder, issued correct benefit and delivered services to her clients in accordance with the rules and regulations of the CAAP Program.

Mrs. [REDACTED] applies employability guideline by the CAAP program handbook. If question arises, she consults with her supervisor.

2. Responsibility and Performance Standard: CAAP Case Load Management

- Desk and Time management.
- Narrate case records in CalWIN.
- Schedule appointments.
- Organize personal workspace.
- Complete timely and accurate filing.
- CalWIN entries.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] is very organized in her personal workplace. She has good management skills. She continues to sustain her appointments properly as possible, scheduling them in a manageable way. She continues to write detailed narratives. She keeps her CALWIN entries up-to-date. She meets her deadlines as required.

3. Responsibility and Performance Standard: Determining on-going Eligibility

- Timely processing of on going CAAP eligibility and PAES.
- Maintain Overdue RV's and PEC's within section standard.
- Complete renewals and update PEC's.
- Timely discontinuance of eligible clients.
- Ensure proper benefits issued including, CBP & S'tabilization.
- Represent County Fair Hearing.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] present caseload are all GA cases. Mrs. [REDACTED] transfer cases to SSIP, PAES and refers her clients to PAES ES, Specialized case workers, and/or PCS as they become eligible. She process and explains EPC to her clients when needed and within the timeframe allowed by the program. She completes her renewals, updating her cases aid and pec codes timely. She maintains no overdue on RV's and ensures that proper benefits are issued to her clients.

During this period, Mrs. [REDACTED] Fair Hearing schedules were properly prepared, and submitted for supervisor's review. All her Fair Hearings have been in the County's favor.

4. Responsibility and Performance Standard: Customer Service

- Adhere to CAAP phone policy.
- Follow HSA Vision, Mission, Values.
- Adapt to changing work situations.
- Minimize customer complaints and maximize compliments.
- Attend to clients needs.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] adheres to DHS phone policy in answering and returning audix messages. She answers her phone and return messages promptly. She always stays maintain her calmness and courteousness when answering concerns or question towards her clients.

Mrs. [REDACTED] refers to the handbook first to verify information, question or procedure, and in if in doubt, refers to Supervisor for assistance.

She follows HSA Vision, Mission, and Values. She tries adapts to changing work situations.

5. Responsibility and Performance Standard: Quantity of work/Motivation

- Perform special assignments. (Home visits, Lead worker Etc.)
- Participate in training for professional and/or personal development.
- Improve performance of unit (monitoring, role model, etc.,)
- Attend & participate in unit meetings and trainings.

Rating: 1 2 3 4 5

Rating Comments:

Mrs. [REDACTED] is a very good worker. During this period, she has actively participated in the following mandatory trainings:

- o Calwin Web Enabled Application Training January 17, 2013
- o Purging and Imaging Procedure – February 28, 2013

Starting February 2013, CAAP program has started the implementation of purging caseload and imaging procedure training in preparation for the program's iFiles environment.

The implementation of iFiles system of indexing and scanning documents that requires clients file folders being purged of extraneous and duplicate documents were applied by Mrs. [REDACTED] in her caseload. She has completed this project within the given time frame properly and accurately.

Last quarter of the year 2013, CAAP Program embraced the Covered California Program. Workers started training for Affordable Care Act (ACA) and CALHEERS (California Healthcare Eligibility, Enrollment, and Retention System). Mrs. [REDACTED] participated on these training:

1. CALHEERS – November 12, 2013
2. ACA – September 22-26, 2014

VI. Overall Performance Rating

1 - Unacceptable	2 - Development Needed	3 - Competent and Effective	4 - Exceeds Standards	5 - Outstanding
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Mrs. [REDACTED] is recommended to continue in her current classification as a 2905 Senior Eligibility Worker.

VII. Professional Development

This section is provided to indicate specific activities, such as, assignments, training and education, that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.

Comments:

Mrs. [redacted] is encouraged to participate in training for professional development offered by DHS not only for self-improvement but also for possible promotion in the Department.

With the introduction of Unit calendars, Qflow, Calheers, and possible Program Integration, Ms. [redacted] is encouraged to adapt to the changes that are going to transpire this 2014.

VIII. Job Standards Meeting

Initials indicate that the Job Standards Meeting has taken place on the date indicated.

Date: 1/11/13

Initials: Sup: [initials] Emp: R.T. Reviewer: [initials]


IX. Mid-Point Review

Initials indicate that the Mid-Point Review has taken place on the date indicated.

Date: 07/19/13

Initials: Sup: [initials] Emp: R.T. Reviewer: [initials]

X. Reporting Supervisor/Manager

Name, Work Address Supervisor/Manager's Name: (First Name Last Name) Lucy Borromeo Work Address: 1235 Mission St., 4 th Flr. San Francisco, CA 94103	Case No. and Title 2907 Eligibility Worker Supervisor	Date Report given to Employee <u>1/15/14</u> (Month/Day/Year)
	 Supervisor/Manager's Signature	<u>1/15/14</u> Date

XI. Reviewer Certification

Name, Work Address Name: (First Name, Last Name) Vladimir Rudakov Work Address: 1235 Mission St., 4 th Fl. San Francisco, CA 94103	Class No. and Title Manager	Date of Conference With Employee (Month/Day/Year)
	Date of Review (Month/Day/Year)	[Signature] 1/15/14 Reviewer's Signature Date

XII. Employee Statement (See Handbook for Statement of Employee Rights)

Employee Statement <input checked="" type="checkbox"/> I Agree with this Report <input type="checkbox"/> I request a Conference with the Reviewer <input type="checkbox"/> Rebuttal Attached <input type="checkbox"/> I Do Not Agree with this Report: Section: _____ Number: _____ *NOTE: Employee Rebuttal must be submitted to Personnel within 30 calendar days from the "Date Report given to Employee" on the Performance Appraisal form.	[Signature] Signature Date Certifies I Have Read the Report
--	--

What was the purpose of your most recent visit of 1235 Mission?

- To apply for CAAP (PAES, SSP, or GA) at Reception
- To see an Intake Eligibility Worker
- To meet with a Carrying Eligibility Worker
- To meet with an SSI Case Manager
- For PCS Services
- For Intake Assessment
- Other (please explain) _____

How long did you wait to see your CAAP worker?

- 15 to 30 minutes
- Between 30 minutes and one hour
- More than one hour

Did you have an appointment?

- Yes
- No (I did not call ahead)

Were you on time?

- Yes
- No (I was late)

Was your worker on time?

- Yes
- No (he/she was late)

I receive courteous and helpful service from CAAP employees (check one)

- Always
- Usually
- Not usually
- Never

I am satisfied with the way CAAP employees respond to my phone calls (check one)

- Always
- Usually
- Not usually
- Never

When I have questions or problems, CAAP employees give me prompt answers (check one)

- Always
- Usually
- Not usually
- Never

My CAAP worker makes sure I understand what I have to do to qualify for or keep my benefits (check one)

- Always
- Usually
- Not usually
- Never

Does your worker tell you the locations of EBT ATMs that do not charge any fees?

- Yes
- No

If no, will you go to this website <http://www.ebt-sf.org> to find out where?

- Yes
- No

Please add your own comments and suggestions. How can we better serve you?

I have visited 3 different food services but they never have a great menu. Can you help?

Thank you

Shirley H Jones

1/18/13



**CITY AND COUNTY OF SAN FRANCISCO
HUMAN SERVICES AGENCY**

PERFORMANCE APPRAISAL REPORT

I. EMPLOYEE IDENTIFICATION INFORMATION

1. NAME LAST NAME: █████ FIRST NAME: █████ MIDDLE INITIAL:	
2. JOB CLASS NUMBER AND TITLE CLASS: 2903 TITLE: Sr. Eligibility Worker	
3. STATUS <input checked="" type="checkbox"/> Permanent (PCS) <input type="checkbox"/> Provisional (TPV) <input type="checkbox"/> Permanent Exempt (PEX)	
4. WORK LOCATION & DIVISION 1235 Mission, 4 th Floor, San Francisco, CA 94103	
5. DEPARTMENT & PROGRAM Human Services Agency, CAAP Program	
6. REASON FOR REPORT <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Program Review Period <input type="checkbox"/> Probationary <input type="checkbox"/> Interim	
7. REVIEW PERIOD (Month/Day/Year) From: July 5, 2012 To July 5, 2013	8. PROBATION START AND END DATE (Month/Day/Year) From: To:

Detailed Information about the HSA Performance Appraisal process may be found in the HSA Personnel Procedures Handbook, Section 9-5

II. EXPLANATION OF SECTIONS

- I. **EMPLOYEE IDENTIFICATION INFORMATION** — Basic information about the employee, his/her status, and the review period.
- II. **EXPLANATION OF SECTIONS** — Basic information about what should be included in each section of the Performance Appraisal Report.
- III. **PERFORMANCE RATING STANDARDS** — Description of Performance Rating Standards and listing of their numeric equivalence.
- IV. **JOB DESCRIPTION** — A list of the duties and responsibilities for this position. To be completed prior to the Job Standards Meeting. Refer to the published Position Description as appropriate.
- V. **PERFORMANCE DESCRIPTION AREAS** — Responsibilities and performance standards must include measurable results. Each responsibility should consider the following elements: quantity, quality, time, cost, and safety:

- | | |
|--|--|
| ◆ Demonstration of HSA values | ◆ Quantity Of Work Performed |
| ◆ Overall Performance of Job Description | ◆ Adaptability To The Work Situation |
| ◆ Results of Performance Objectives | ◆ Effectiveness Of Working With Others |
| ◆ Knowledge Of Job | ◆ Use Of Materials And Equipment |
| ◆ Employee's Strengths | ◆ Safety |
| ◆ Achievements | ◆ Performance Plans |
| ◆ Attendance And Punctuality | ◆ Customer Service |

In addition to the areas above, the following areas may be addressed for supervisors/managers:

- | | | |
|----------------------------------|---------------------------------|-------------------|
| ◆ Communication | ◆ Planning | ◆ Decision Making |
| ◆ Directing and Motivating Staff | ◆ Training and Developing Staff | |

Supervisors are required to provide an explanation of all ratings.

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Responsible for specialized caseloads such as:

- Halfway House
- Income Disregard Program.
- Language cases, such as: Russian, Spanish and Filipino.
- Stabilization
- Pregnant clients.

Follow HSA Vision, Mission and Core values and adhere to Personnel Procedures.

Job Class: 2903	Job Title: CAAP Carrying Eligibility Worker		
Employee Name: Last: ██████	First: ██████	MI: ██████	
Rating Period: (Month/Day/Year)		From: 07/05/2012	To: 07/05/2013

V. PERFORMANCE DESCRIPTION AREAS

Responsibilities and Performance Standards - Rating and Comments

In the following sections describe the job responsibilities and performance standards.

It may be helpful to reference the Major Responsibilities outlined in the Job Description Section IV.

Select a rating level number and provide an explanation of each performance rating in the "comments" box.

- 1 - Unacceptable
- 2 - Development Needed
- 3 - Competent and Effective
- 4 - Exceeds Standards
- 5 - Outstanding

Sec. V - A. Departmental Requirements

1. Responsibility: Disaster Service Worker Preparedness

Take all necessary steps to prepare yourself for an emergency.

In your capacity as a Disaster Service Worker:

- Provide updated personal contact information to your department so that you can be contacted in the event of an emergency;
- Report in and respond promptly to instructions by the City and/or your department in the event of an emergency;
- Complete the Department of Human Resources Disaster Service Worker and Personal Preparedness Training by the date as determined by the agency;
- Carry out disaster-related work assignments as required.

Yes No

Comments:

Mr. ██████ has maintained his personal contact information up-to-date for events of emergency.

2. Responsibility: Commitment to Health & Safety

- Comply with departmental safety and security guidelines and policies.
- Report all occupational injuries, illnesses and near misses to your Supervisor.
- Correct or report unsafe working conditions.
- Ask for assistance or guidance when you do not fully understand the safe way to do your job.
- Work safely and promote and facilitate a safe work environment.
- Not undertake any task, use any tool, or operate equipment unless authorized to do so.
- Attend scheduled Health and Safety training and medical surveillance examinations as required.
- Use and maintain personal protective equipment required for safe job performance.

Yes No

Comments:

Mr. [REDACTED] has maintained a safe and secured working condition in his work area.

He has actively participated in the following training provided by the Department:

IIPP 2nd Quarter 2012 Training: Office Safety, Sept. 5, 2012

IIPP 3rd Quarter 2012 Training: Preparing for Seasonal Flu/

Practicing Healthy Habits, December 13, 2012

3. Responsibility: Upholds Agency Vision, Mission, and Core Values

VISION: San Francisco is a diverse community whose children, youth, families, adults, and seniors are safe, self-sufficient and thriving.

MISSION: The Human Services Agency promotes well-being and self-sufficiency among individuals, families, and communities in San Francisco.

VALUES

- Respect
- Diversity
- Integrity
- Partnership
- Customer Service
- Communication
- Continuous Improvement

For a complete description of the Core Values, please visit the HAS Intranet under Vision, Mission & Core Values.

Yes No

Comments:

Mr. [REDACTED] follows HSA Vision, Mission and Core values and adheres to Personnel Procedures.

4. Responsibility: Attendance Standards

The Agency has established the following uniform attendance standards to measure employee performance in this area and its corresponding performance evaluation rating in a twelve month period. The Standard in Hours below refers to hours of absence. Absence shall include Sick Leave (sick leave not covered under the FMLA, Workers Compensation, or ADA approved leaves), AWOL, and other unexcused absences from work. Refer to Section 9-8, VI. - A, in the Personnel Policy and Procedures Manual for specific details on Attendance.

<u>Standards In Hours</u>	<u>Performance Rating</u>
0 up to and including 32 hours	5 - Outstanding
Over 32 and including 64 hours	4 - Exceeds Standards
Over 64 and including 104 hours	3 - Competent and Effective
Over 104 and including 128 hours	2 - Development Needed (High rate of lateness and/or absence)
Over 128 hours	1 - Unacceptable (Excessive and persistent pattern of lateness and/or absence)

Rating: 1 2 3 4 5

Rating Comments:

During the report period from 07/05/12 through 07/05/13, Mr. [REDACTED] took a total of 44 hours sick leave. According to the DHS Personnel Handbook on Attendance, this is considered Exceeds Standards.

Sec. V – B. Individual Job Responsibilities and Performance Standards.

1. Responsibility and Performance Standard: KNOWLEDGE

Maintaining eligible clients in active status.

- Residency verification
- ID, SSC, BC
- Verification of earned and unearned income
- Resolve "Lost Warrants" or EBT problems.
- SSI application verification

Discontinuing Ineligible Clients.

- FRED and SIU referrals.
- Referral to other programs – Food Stamps, Medical, CAPI.
- Explaining Remedy and Fair Hearings to Clients.

Monitoring Employability Requirements:

- Student Status
- Referral to other CAAP Units (PAES, GA & SSIP)
- DPW
- Job search
- Triage & Dr. referrals

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] understands the basic rules, regulations, policies and procedures of the CAAP Program and was able to apply them during the desk training. Mr. [REDACTED] has managed his time well, sent notices in a timely manner, filed documents in correct folder, issued correct benefit and delivered services to her clients in accordance to the rules and regulation of the CAAP Program. Mr. [REDACTED] maintains his eligible clients in active status, and properly discontinues ineligible cases. He processes verification requirements of clients both homeless and houses. As needed, he processes ID, Social Security Cards and Birth certificate requests.

2. Responsibility and Performance Standard: CAAP Case Load Management

- Desk and Time management.
- Narrate case records in CalWIN.
- Schedule appointments.
- Organize personal workspace.
- Complete timely and accurate filling.
- CalWIN entries.

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] has PAES caseload. Mr. [REDACTED] work performance is commendable as he demonstrates good desk and time management skills.

His scheduling is organized. He writes very detailed narrative, maintained his appointments.

3. Responsibility and Performance Standard: Determining on-going Eligibility

- Timely processing of on going CAAP eligibility and PAES.
- Maintain Overdue RV's and PEC's within section standard.
- Complete renewals and update PEC's.
- Timely discontinuance of eligible clients.
- Ensure proper benefits issued including, CBP & Stabilization.
- Represent County Fair Hearing.

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] transfer cases to GA/PAES as they become eligible. He completes his recertifications in the month they are due, update his cases aid and pec codes timely. Mr. [REDACTED] also ensures that ineligible clients are discontinued, and that proper benefits are issued.

4. Responsibility and Performance Standard: Customer Service

- Adhere to CAAP phone policy.
- Follow HSA Vision, Mission, Values.
- Adapt to changing work situations.
- Minimize customer complaints and maximize compliments.
- Attend to clients needs.

Rating: 1 2 3 4 5

Rating Comments:

Mr. [REDACTED] is very courteous and respectful to his clients. He is thorough in explaining information to his clients. He also answers his phone and returns calls promptly. Mr. [REDACTED] received two compliments during this period of evaluation. Copies attached.

5. Responsibility and Performance Standard: Quantity of work/Motivation

- Perform special assignments. (Home visits, Lead worker Etc.)
- Participate in training for professional and/or personal development.
- Improve performance of unit (monitoring, role model, etc.)
- Attend & participate in unit meetings and trainings.

Rating: 1 2 3 4 5

During this period, Mr. [REDACTED] has actively participated in the following mandatory trainings:

- Yes Program Training, August 20, 2012
- Calwin Web Enabled Application Training January 17, 2013
- Purging and Imaging Procedure – February 28, 2013

Starting February 2013, CAAP program has started the implementation of purging caseload and Imaging procedure training in preparation for the program's iFiles environment.

The implementation of iFiles system of indexing and scanning documents that requires clients file folders being purged of extraneous and duplicate documents were readily embraced and applied by Mr. [REDACTED] in his caseload. He has completed this project within the given time frame properly and accurately, with correct attitude and enthusiasm.

VI. Overall Performance Rating

1 - Unacceptable

2 - Development Needed

3 - Competent and Effective

4 - Exceeds Standards

5 - Outstanding

Mr. [REDACTED] is recommended to continue in his current classification as a 2903 Eligibility Worker.

VII. Professional Development

This section is provided to indicate specific activities, such as; assignments, training and education, that the employee should participate in during the next rating period. The activities can help the employee prepare for future advancement or to improve performance in areas where he/she needs improvement.

Comments:

In Mr. [REDACTED] first six months as an EW, I had difficulty having him submit reports and cases without reminding him to be more timely. More specific example is his Fair Hearing cases requested for review prior to hearing date.

However during this second six month evaluation period, Mr. [REDACTED] has notably overcome his difficulties. Not only in submitting his work timely, but also in improving the quality of his work. Mr. [REDACTED]'s written narrative is more thorough making it easier for his co-workers and his supervisor to understand the sequence of case management.

Mr. [REDACTED] is continuously growing and maturing in his capacity as an EW. He is encouraged to participate in trainings for continued personal growth.

VIII. Job Standards Meeting

Initials indicate that the Job Standards Meeting has taken place on the date indicated.

Date: 07/01/2012

Initials: Sup: [Signature] Emp: PN Reviewer: [Signature]

IX. Mid-Point Review

Initials indicate that the Mid-Point Review has taken place on the date indicated.

Date: 01/19/2013

Initials: Sup: MB Emp: PN Reviewer: W

X. Reporting Supervisor/Manager

Name, Work Address Supervisor/Manager's Name: (First Name Last Name) Lucy Borromeo Work Address: 1235 Mission St., 4 th Fl. San Francisco, CA 94103	Class No. and Title 2907 Eligibility Worker Supervisor	Date Report given to Employee 07/05/2013 (Month/Day/Year)
	<i>LBorromeo</i> Supervisor/Manager's Signature	07/05/2013 Date

XI. Reviewer Certification

Name, Work Address Name: (First Name, Last Name) Vladimir Rudakov Work Address: 1235 Mission St., 4 th Fl. San Francisco, CA 94103	Class No. and Title Manager	Date of Conference With Employee (Month/Day/Year)
	Date of Review (Month/Day/Year)	<i>[Signature]</i> 7/10/13 Reviewer's Signature Date

XII. Employee Statement (See Handbook for Statement of Employee Rights)

<p>Employee Statement</p> <p><input checked="" type="checkbox"/> I Agree with this Report</p> <p><input type="checkbox"/> I request a Conference with the Reviewer</p> <p><input type="checkbox"/> Rebuttal Attached*</p> <p><input type="checkbox"/> I Do Not Agree with this Report:</p> <p>Section: _____ Number: _____</p> <p>*NOTE: Employee Rebuttal must be submitted to Personnel within 30 calendar days from the "Date Report given to Employee" on the Performance Appraisal form.</p>	<p><i>[Signature]</i> 7/9/13 Signature Date</p> <p>Certifies I Have Read the Report</p>
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City and County of San Francisco



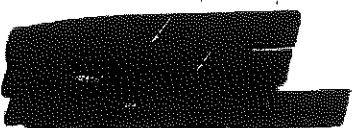
Edwin M. Lee, Mayor

Human Services Agency

Department of Human Services
Department of Aging and Adult Services

Trent Rhorer, Executive Director

May 29, 2013



Dear Ms. Hayward,

I would like to acknowledge receipt of your letter complimenting one of my workers, Mr. [REDACTED], Worker U456.

I understand that Mr. [REDACTED] has been very helpful and efficient in assisting you with your General Assistance.

Thank you for taking the time in sharing your experience with us. We pride ourselves in knowing that our workers care for their clients with utmost understanding and good customer service. It is always gratifying to know when we've met this expectation.

I will commend Mr. [REDACTED] for his good work, and share your comments with our Section Manager and Program Director.

Thank you so much.

Respectfully,

A handwritten signature in cursive script, appearing to read "Lucy Borromeo".

Lucy Borromeo
Carrying Unit Supervisor
County Adult Assistance Program

Cc: Rosana Soriano, Acting Program Director
Vladimir Rudakov, Carrying Section Manager
[REDACTED]
File

Client's Compliment/Complaint Form

City & County of San Francisco
Department of Human Services

Important: Do not use this form to file a complaint regarding eligibility, or if you are a foster care provider, regarding a child's being moved from your care. See the reverse side for additional information.

Please complete this form. You may leave it at the front desk or mail it to

Department of Human Services
City & County of San Francisco
PO Box 7988
San Francisco, CA 94120
Attn: Program Manager's Office

Date 05/22/13

Your Name [REDACTED]

Name of DHS Staff [REDACTED] Worker # 0456

Adult Services () CAAP CalWORKS () Employment Services ()
F & CS () Food Stamps () Homeless () Investigations () Medi-Cal ()

This is a compliment:

This is a complaint: ()

Tell us about it ~~she~~ IS VERY A HELPFUL AND EFFICIENT WORKER. I ALWAYS GET WHATEVER NEEDS TO BE DONE VERY FAST. THANKS!

Signature [Signature]

Social Security Number [REDACTED]
(Not required but helpful in accessing our records)

Address [REDACTED]

Telephone Number [REDACTED]
Email Address [REDACTED]

How would you like to be contacted?
() Phone () Mail Email

What was the purpose of your most recent visit at 1235 Mission?

- To apply for CAAP (PAES, SSP, or GA) at Reception
- To see an Intake Eligibility Worker
- To meet with a Carrying Eligibility Worker
- To meet with an SSI Case Manager
- For PCS Services
- For Tringe Assessment
- Other (please explain)

How long did you wait to see your CAAP worker?

- 15 to 30 minutes
- Between 30 minutes and one hour
- More than one hour

Did you have an appointment?

- Yes
- No (I did not call ahead)

Were you on time?

- Yes
- No (I was late)

Was your worker on time?

- Yes
- No (he/she was late)

I receive courteous and helpful service from CAAP employees (check one)

- Always
- Usually
- Not usually
- Never

I am satisfied with the way CAAP employees respond to my phone calls (check one)

- Always
- Usually
- Not usually
- Never

When I have questions or problems, CAAP employees give me prompt answers (check one)

- Always
- Usually
- Not usually
- Never

My CAAP worker makes sure I understand what I have to do to qualify for or keep my benefits (check one)

- Always
- Usually
- Not usually
- Never

Does your worker tell you the locations of EBT ATMs that do not charge any fees?

- Yes
- No

If no, will you go to this website <http://www.ebt-sf.org> to find out where?

- Yes
- No

Please add your own comments and suggestions. How can we better serve you?

My worker recently did a cleanup of my records and I was very happy. My worker was very helpful and I was able to get my records back. I was very happy and I was able to get my records back. I was very happy and I was able to get my records back.

THE FOLLOWING MATERIALS ARE INCLUDED FOR INFORMATIONAL/BACKGROUND PURPOSES ONLY. THEY ARE RELATED THE ORIGINAL APPEAL BY SEIU, LOCAL 1021 OF THE 2903 ELIGIBILITY WORKER JOB ANNOUNCEMENT.

THIS MATTER HAS ALREADY BEEN DECIDED BY THE CIVIL SERVICE COMMISSION. AT ITS MEETING OF FEBRUARY 4, 2013, THE COMMISSION: “Adopted the report. Sustained the decision of the Human Resources Director. Denied the appeal by Sin Yee Poon on behalf of SEIU Local 1021. (Vote of 3 to 0; Commissioner Jung was excused during this item)”



CIVIL SERVICE COMMISSION

CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

January 24, 2013

NOTICE OF CIVIL SERVICE COMMISSION MEETING

KATE FAVETTI
PRESIDENT

SCOTT R. HELDFOND
VICE PRESIDENT

MARY Y. JUNG
COMMISSIONER

E. DENNIS NORMANDY
COMMISSIONER

JENNIFER C. JOHNSTON
EXECUTIVE OFFICER

Sin Yee Poon
SEIU Local 1021
350 Rhode Island Street, 100 South
San Francisco, CA 94103

**SUBJECT: APPEAL BY SIN YEE POON ON BEHALF OF SEIU LOCAL 1021,
REGARDING THE JOB ANNOUNCEMENT FOR CLASS 2903
ELIGIBILITY WORKER (CBT-2903-059333).**

Dear Ms. Poon:

The above matter will be considered by the Civil Service Commission at a meeting to be held on **February 4, 2013 at 5:00 P.M. in Room 400**, Fourth Floor, City Hall, 1 Dr. Carlton B. Goodlett Place.

This item will appear on the regular agenda. Please refer to the attached Notice for procedural and other information about Commission hearings.

Attendance by you or an authorized representative is preferable. Should you or a representative not attend, the Commission will rule on the information previously submitted and testimony provided at its meeting. Where applicable, the Commission has the authority to uphold, increase, reduce, or modify any restrictions recommended by the department. All calendared items will be heard and resolved at this time unless good reasons are presented for a continuance.

All non-privileged materials being considered by the Civil Service Commission for this item are available for public inspection and copying at the Civil Service Commission office Monday through Friday from 8:00 a.m. to 5:00 p.m.

CIVIL SERVICE COMMISSION

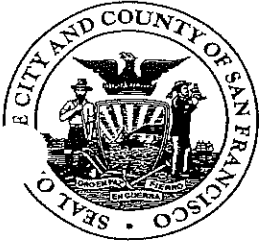
JENNIFER JOHNSTON
Executive Officer

Attachment

c: Jeanne Buick, Department of Human Resources
Micki Callahan, Human Resources Director
Linda Simon, Department of Human Resources
Chief Greg Suhr, San Francisco Police Department
Svetlana Vaksberg, Department of Human Resources
Alice Villagomez, San Francisco Police Department
Commission File
Commissioners' Binder
Chron

THIS DOCUMENT SUPPORTS
CALENDAR ITEM 17

**ORIGINAL APPEAL
SUBMITTED BY
APPELLANT**



**CIVIL SERVICE COMMISSION
CITY AND COUNTY OF SAN FRANCISCO**

EDWIN M. LEE
MAYOR

NOTICE OF RECEIPT OF APPEAL

DATE: October 9, 2012
REGISTER NO.: 0355-12-4
APPELLANT: SIN YEE POON (SEIU 1021)

KATE FAVETTI
PRESIDENT

SCOTT R. HELDFOND
VICE PRESIDENT

MARY Y. JUNG
COMMISSIONER

E. DENNIS NORMANDY
COMMISSIONER

Micki Callahan
Human Resources Director
Department of Human Resources
1 South Van Ness Avenue, 4th Floor
San Francisco, CA 94103

Dear Ms. Callahan:

The Civil Service Commission has received the attached letter of appeal from Sin Yee Poon, SEIU Local 1021; appealing the job announcement for class 2903 Eligibility Worker (CBT-2903-059333). The appeal of the 2903 Eligibility Worker job announcement, issued on September 14, 2012 is transmitted to you for review and action as is appropriate.

This matter has been tentatively scheduled for hearing by the Civil Service Commission at 2:00 p.m. on November 19, 2012 in Room 400, 4th Floor, City Hall, 1 Dr. Carlton B. Goodlett Place. If you are unable to proceed on this date or if for any reason the appeal is not timely or appropriate, please notify me by use of the "Action Request on Pending Appeal/Request" (CSC Form Number 13).

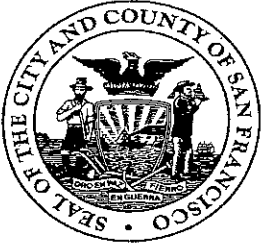
Sincerely,

CIVIL SERVICE COMMISSION

JENNIFER C. JOHNSTON
Executive Officer

Attachment

- c: Donna Kotake, Department of Human Resources
- John Kraus, Department of Human Resources
- Robert Thomas, Human Services Agency
- Elizabeth Jacobi, Department of Public Health



CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

EDWIN M. LEE
MAYOR

DATE: October 9, 2012

REGISTER NO.: 0355-12-4

APPELLANT: SIN YEE POON (SEIU 1021)

KATE FAVETTI
PRESIDENT

SCOTT R. HELDFOND
VICE PRESIDENT

MARY Y. JUNG
COMMISSIONER

E. DENNIS NORMANDY
COMMISSIONER

Sin Yee Poon
SEIU Local 1021
350 Rhode Island St., Ste. 100 South
San Francisco, CA 94103

Dear Ms. Poon:

The Civil Service Commission has received your letter appealing the job announcement for class 2903 Eligibility Worker issued on September 14, 2012.

Your request has been forwarded to the Department of Human Resources for investigation and response to the Civil Service Commission.

If timely and appropriate, this matter will be scheduled for hearing by the Civil Service Commission in the near future. You will be notified approximately one week in advance of the hearing date. In the meantime, you may wish to compile any additional information you would like to submit to the Commission in support of your position. In addition, you will be notified and provided a copy of the staff report of your matter when it is received in the Commission office.

The Civil Service Commission meets on the 1st and 3rd Mondays of each month. The deadline for receipt in the Commission office of any additional information you may wish to submit is 5:00 p.m. on the Tuesday preceding the meeting date.

Sincerely,

CIVIL SERVICE COMMISSION

JENNIFER C. JOHNSTON
Executive Officer

c: Micki Callahan, Human Resources Director
Donna Kotake, Department of Human Resources
John Kraus, Department of Human Resources
Robert Thomas, Human Services Agency
Elizabeth Jacobi, Department of Public Health



CIVIL SERVICE COMMISSION
City and County of San Francisco
 25 Van Ness Avenue, Suite 720
 San Francisco, California 94102-6033
 Anita Sanchez, Executive Officer
 (415) 252-3247

CSC Register No.
 0355 12 4
 To: X M. CALLAHAN
 CC: D. KOTAKE
 J. KRAUC
 R. THOMAS
 E. JACOB

APPEAL TO THE CIVIL SERVICE COMMISSION

INSTRUCTIONS: Submit an original copy of this form to the Executive Officer, Civil Service Commission, 25 Van Ness Avenue, Suite 720, San Francisco, CA 94102-6033. Appeal must be received by the Executive Officer within the designated number of days following the postmarked mailing date of notification from the Department of Human Resources to the appellant. Original signature of appellant or authorized representative required for appeals. (E-mail not accepted.) *COB=Close of Business	TYPE OF APPEAL: (Check One)
	<input type="radio"/> Examination Matters (by COB* on 5 th working day) <input type="radio"/> Employee Compensation Matters (by COB* on 7 th working day) - Limited application <input type="radio"/> Personal Service Contracts (Posting Period) <input type="radio"/> Other Matters (30 Calendar days) (i.e., Human Resources Director/ Executive Officer Action) <input type="radio"/> Future Employability Recommendations (See Notice to Employee)

Sin Yee Poon (on behalf of lower flex classes), Local 1021 Full Name of Appellant	SEIU Local 1021, 350 Rhode Island, Su. 100 So.; (415) 848-3663 Work Address	Work Telephone
Job Code	Title	Department
Residence Address	City	State Zip Home Telephone
Full Name of Authorized Representative (if any)	Telephone Number (including Area Code)	

COMPLETE THE BASIS OF THIS APPEAL ON THE REVERSE SIDE. (Use additional page(s) if necessary)

Does the basis of this appeal include new information not previously presented in the appeal to the Human Resources Director? If so, please specify.	Check One: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
---	---

Sin Yee Poon
 Original Signature of Appellant or Authorized Representative

2012 OCT -4 PM 4:50
 10/4/2012
 Date

RECEIVED
 EXECUTIVE OFFICER
 CIVIL SERVICE COMMISSION
 SAN FRANCISCO

State the basis of this appeal in detail:

Please see attached.

On behalf of the incumbents of the flexibly staffed classification series, including but not limited to the 2903/2905, 9702/9703, 2910/2912, I am hereby appealing the decision of the Human Resources Director, dated September 26, 2012, and postmarked September 27, 2012, declining to uphold my September 21st appeal regarding the changes made to the job description, deviating from the official class specification, in the September 17th job announcement of the 2903 Eligibility Worker.

Specifically, the September 17th job description omitted key elements of the 2903 class specification, i.e. the references to the "Distinguishing Features" of the 2903 as "the entry level class in the Eligibility Worker series. . . distinguished. . . by tasks and duties being performed under closer supervision. . . this class is typically used as a training class Positions in [2905] class are flexibly staffed and are normally filled by advancement from the class 2903 level."

I must point out to the Commission that the "Definition" of the Classifications 2903 Eligibility Worker and 2905 Senior Eligibility Worker are the same. The differences between the two classifications are described in the "Distinguishing Features" section of the Class Specifications, and these "Distinguishing Features" of each classification determine both the type of duties and the level of responsibility appropriate to each classification.

Issuing a job announcement/job description of the 2903 without references to the "Distinguishing Features" is tantamount to issuing a job description of the 2905 and calling it classification 2903 with the pay level of the 2903 and is, therefore, inconsistent with the official class specification.

Civil Service Rule Sec. 109.6 Class Specification provides in part that "The appointing Officer has the authority to assign an employee to perform work provided that it is consistent with the type of duties and level of responsibility of the employee's class" Rule Section 109.16.2 additionally provides in part that "4) Temporary out-of-class assignments shall not be made when an appointment based on the regularly established Rules and procedures of the Civil Service Commission may be made."

As we believe the intent of the Human Services Agency is to assign duties of the 2905 to the new hires responding to the current job announcements, the City's issuance of a job announcement and job description of a 2903 that is indistinguishable from the job description of the 2905, since the Distinguishing Features of the 2903 are consciously omitted, is in violation of the Civil Service Rule 109 as detailed above, in addition to violations of other relevant Rules.

Therefore, on behalf of the other appellant, I ask the Civil Service Commission to:

- ◆ Direct the Human Resources Department to rescind the current 2903 job announcement and job description and revise same so that it is consistent with the official class specification of the 2903 prior to reissuance.
- ◆ Find City Departments that use 2903s (or other lower flex classifications) to perform the work of the 2905 (or other corresponding higher flex classifications) to be in violation of Civil Service Rules and take appropriate action to remedy the violations, including but not limited to halting the inappropriate assignments.

Thank you, Commissioners, for your time and attention to this matter.

Eng, Sandra

ADDITIONAL MATERIAL

RE: S. POON APPEAL

From: Sin Yee Poon <SinYee.Poon@SEIU1021.ORG>
Sent: Friday, October 05, 2012 2:07 PM
To: Callahan, Micki; Eng, Sandra
Cc: Pena, Renato; Bynum, Michael; Supreet Pabla; Gus Feldman; Thomas, Robert; Gran, Martin
Subject: RE: 2903 ELIGIBILITY WORKER
Attachments: M Callahan Response 9-26_001.pdf; Flex Appeal to CSC 10-4-_001.pdf

Good Afternoon, Ms. Callahan.

Attached are 1) your 9/26 response to my 9/21 appeal below, and 2) my 10/4 appeal to the Civil Service Commission regarding your 9/26 response/decision. This is your courtesy copy; the original was hand delivered to the Civil Service Commission office yesterday afternoon.

Ms. Eng, the Union would like to request that this item be heard at 5:30 p.m. to allow interested members in the flex classifications to attend and to address the Commission. Please let me know if I should direct this request to the new Executive Officer, as I am not sure whether she has taken office as of yet. Thank you for your attention to this matter.

Sin Yee Poon
Chief Elected Officer
SEIU Local 1021

From: Sin Yee Poon
Sent: Friday, September 21, 2012 2:45 PM
To: 'Kraus, John'; Callahan, Micki
Cc: Renato Pena (Renato.Pena@sfgov.org); Michael Bynum (Michael.Bynum@sfgov.org); Supreet Pabla; Gus Feldman; Thomas, Robert; Gran, Martin; Penland, Christina; Biasbas, Anna; 'Sandra.Eng@sfgov.org'
Subject: RE: 2903 ELIGIBILITY WORKER

Thank you, Mr. Kraus, for your response.

My original message 9/17/2012 message to Ms. Callahan, was the appeal to the Human Resources Director regarding the decision of her staff to post a job announcement which is inconsistent with the class specifications. However, I will be happy to restate the appeal.

Dear Human Resources Director Callahan:

This shall serve as the appeal of the determination by HSA, DPH, and DHR staff to substantively modify, making for inconsistency with, the class specifications of the 2903 Eligibility Worker classification in the current job announcement posted on the DHR website.

Specifically, per the 2903 class specifications, the 2903 "is the entry level class in the Eligibility Worker series. . . distinguished . . . by tasks and duties being performed under closer supervision. . . this class is typically used as a training class Positions in [2905] class are flexibly staffed and are normally filled by advancement from the class 2903 level."

The job announcement posted has deleted all references to all the entry level, training class (feeder class to the 2905), closer supervision, etc., making the level of responsibility and the type of duties described inconsistent with that contained in the class specifications. Further, the Department has, after hiring the new 2903s (and other lower flex

classifications) through this type of job announcement description, worked the new hires without regard to the entry level, training class, closer supervision level of responsibility and tasks.

In altering the class specifications and assignment of tasks to be inconsistent with the type of duties and/or level of responsibility of the official 2903 class specifications, the City has violated Civil Service Rules 109.6 and 109.16 and any other relevant, applicable Rule.

Please let me know if you require additional information regarding this appeal.

Thank you for your attention to this matter.

Sin Yee Poon
Chief Elected Officer
SEIU Local 1021

From: Kraus, John [mailto:john.kraus@sfgov.org]
Sent: Tuesday, September 18, 2012 3:42 PM
To: Sin Yee Poon
Cc: Thomas, Robert; Gran, Martin; Penland, Christina; Callahan, Micki; Biasbas, Anna
Subject: RE: 2903 ELIGIBILITY WORKER

Dear Ms. Poon:

Your concern regarding the announcement for 2903 Eligibility Worker (CBT-2903-059333) has been brought to my attention. Specifically, you believe that the announcement is inconsistent with the type of duties and/or level of responsibility described in the 2903 job specification.

The language of the announcement has been reviewed by several HR personnel, including myself, in response to your concern. Although the duties described in the announcement may not be verbatim from the job specification, they are consistent with the duties, knowledge and skills stated in the job specification, and in fact paraphrase those items.

It should be pointed out that the eligible list produced as a result of the current 2903 announcement will be used by both the Departments of Public Health and Human Services. Therefore, the format of the current 2903 announcement is such that the duties of an Eligibility Worker in each of these departments are described separately. In this regard, please note that the Department of Human Services' job description language is essentially no different from that which was used previously in the DHS recruitment for 2903 Eligibility Worker in 2009 (CBT-2903-056020). Also, no appeals of the job duties were received in response to the Eligibility Worker job announcement that was issued in 2009.

The 2903 job specification includes a section that distinguishes the duties of a 2903 Eligibility Worker from those of a 2905 Senior Eligibility Worker. These distinguishing features are not discussed in the 2903 Eligibility Worker job announcement, nor do they need to be. That is, it is not the general practice to include in a job posting language that differentiates the target class from other classes that might exist within the title series. Rather, a brief description of the job and listing of the essential job duties is sufficient for the purpose of recruiting job applicants. How the posted job class differs from other classes within the title series is more of a classification matter.

If you believe that there are certain job duties that don't belong in the 2903 announcement or that key job duties have been omitted in the announcement, please bring those to my attention. I would be glad to review specific items that may be of concern to you. Otherwise, I see no reason to delay the current recruitment and examination process for 2903 Eligibility Worker.

You may appeal this determination to the Human Resources Director within five (5) business days from receipt of this notification. Your appeal must be submitted in writing and must specify the basis upon which it is being made.

Sincerely,

John Kraus
Director, Recruitment and Assessment Services
Department of Human Resources

From: Callahan, Micki
Sent: Monday, September 17, 2012 4:34 PM
To: Sin Yee Poon
Cc: Thomas, Robert; Gran, Martin; Kraus, John; Penland, Christina
Subject: RE: 2903 ELIGIBILITY WORKER

Hello Sin Yee,
We will review the matter with the department and with our RAS unit, and will get back to you with a response.

Regards,

Micki Callahan
Human Resources Director
City and County of San Francisco
One South Van Ness Ave, 4th floor
San Francisco, CA 94103
415-557-4845

From: Sin Yee Poon [mailto:SinYee.Poon@SEIU1021.ORG]
Sent: Monday, September 17, 2012 1:35 PM
To: Callahan, Micki
Cc: Thomas, Robert; Gran, Martin
Subject: FW: 2903 ELIGIBILITY WORKER

Good Afternoon, Ms. Callahan:

It has been brought to the Union's attention that DHR has on its website a job announcement, for an examination of the 2903 classification, which is inconsistent with the type of duties and/or level of responsibility of the official 2903 class specifications.

Said job announcement and description of duties is in violation of Civil Service Rules 109.6 and 109.16.

The Union is requesting that this job announcement be rescinded and revised for re-posting, so that it is consistent with the 2903 job specifications.

Thank you.

Sin Yee Poon
Chief Elected Officer
SEIU Local 1021

From: Penland, Christina [mailto:christina.penland@sfgov.org]
Sent: Monday, September 17, 2012 11:53 AM
To: Sin Yee Poon
Cc: Thomas, Robert; Gran, Martin; Hodgkinson, Richard; Kraus, John
Subject: RE: 2903 ELIGIBILITY WORKER

Good Morning Sin Yee,

The class specification for 2903 Eligibility Worker as not been revised, therefore we have not posted any classification action. For your information, the class specification can be found online through this link:

<http://www.jobaps.com/SF/specs/classspecdisplay.asp?ClassNumber=2903>.

Questions regarding any particular recruitment announcement should be directed to the recruiting analyst listed on the announcement or the Recruitment and Assessment Services Unit.

Thank you!

Christina Penland, Senior Classification and Compensation Analyst
City and County of San Francisco, Department of Human Resources
One South Van Ness Ave, 4th Floor, San Francisco, CA 94103
Phone: (415) 557-4848, Fax: (415) 557-4967
Christina.Penland@sfgov.org
www.sfgov.org/dhr

From: Sin Yee Poon [<mailto:SinYee.Poon@SEIU1021.ORG>]
Sent: Monday, September 17, 2012 11:13 AM
To: Penland, Christina
Cc: Thomas, Robert; Gran, Martin
Subject: FW: 2903 ELIGIBILITY WORKER

Ms. Penland:

I was forwarded a HSA job announcement this morning which substantially changes the job specifications for the 2903 classification. I did not receive a notice of a classification posting to change the specifications of the 2903 classification.

Please clarify as to how the specifications were changed without a classification posting.

Additionally, the Union is requesting that this 2903 examination be put on hold immediately pending a meet and confer regarding any proposed changes to the classification job specifications.

Please let me know if you are not the person to receive such requests.

Thank you for your prompt attention to this important matter.

Sin Yee Poon
Chief Elected Officer
SEIU Local 1021

From: HSAExams/DHS/CCSF
To:
Date: 09/14/2012 08:36 AM
Subject: 2903 ELIGIBILITY WORKER

The HSA Job Announcement for the 2903 Eligibility Worker is now available at the Department of Human Resources website:

<http://www.jobaps.com/sf/sup/BulPreview.asp?R1=CBT&R2=2903&R3=059333>

Applications will be accepted through September 21, 2012 5:00:00 PM.

To apply: Please follow the directions as indicated on the website.

Please do not reply to this email - This is for informational purposes only.

City and County of San Francisco



Department of Human Resources

Edwin M. Lee
Mayor

Micki Callahan
Human Resources Director

September 26, 2012

Sin Yee Poon
Chief Elected Officer
SEIU Local 1021
350 Rhode Island Suite 100
San Francisco, CA 94103

Dear Ms. Poon:

This is in reply to your 9/21/12 appeal of the announcement for 2903 Eligibility Worker (CBT-2903-059333). You assert that this current job announcement is inconsistent with the 2903 class specification because it does not include certain information that is included in the class specification.

Specifically, you state the 2903 specification refers to this classification as an entry level class within the Eligibility Worker title series and, therefore, employees who work in this class do so under "closer supervision". You also state that the job announcement deletes all references to the 2903 class as a training class, which therefore serves as feeder class to the higher-level, 2905 classification.

In reply, the job specification provides information useful for recruiting (i.e., for posting job announcements). For example, it contains information regarding job duties, tasks and/or activities of the classification, as well as information about major job requirements and worker characteristics necessary to perform job activities. Job seekers appreciate this information because it allows them to assess their interest and abilities relative to the type of work described.

A job specification, however, is used for other purposes and is viewed by many personnel specialists as a document that is primarily oriented toward classification and/or compensation purposes, not personnel selection. For example, it may include information that is useful to determine if a worker in a particular position holds the correct title. Consequently, it is not unusual to have the job specification include additional information which places the job in context and helps differentiate it from similar classifications (e.g., those within a title series). However, this type of information typically is not included in a job announcement because its purpose is primarily for classification, not recruitment.

The information that you believe is missing from the 2903 announcement (e.g., "closer supervision", training class, feeder class, entry-level class) is all designed to help differentiate the 2903 classification from other classes (e.g., 2905). Again, although this information is useful for classification purposes, it is not required by the job announcement. For example, the 2903 job announcement informs job seekers that a 2903 Eligibility Worker performs work under

"general supervision". However, it is not necessary for the job seeker to know that this level of supervision is "closer" than that which occurs for 2905 Senior Eligibility Workers.

You have not identified any specific, job announcement duties or tasks that conflict with information in the job specification. Rather, you suggest that there are omissions in the announcement and that this makes it inconsistent with the job specification. However, as I have tried to explain, the job announcement is not the job specification. Therefore, the information you believe is missing, which pertains to classification, does not need to be included in the job announcement. What is important is that the 2903 Eligibility Worker job announcement accurately reflect the duties, tasks and minimum eligibility requirements that are addressed in the 2903 job specification.

Finally, you make reference to the fact that "flexible staffing" has occurred in association with the 2903 and 2905 classifications in the past. Please be reminded that the authority to implement flexible staffing on an announcement by announcement basis resides with the Human Resources Director.

Sec. 111.16 Authorization for Flexible Staffing Program

The Human Resources Director is authorized to establish flexible staffing programs to promote permanent civil service employees past the probationary period to higher classes within an occupational series or to another series by methods other than traditional selection procedures. In establishing a flexible staffing program, the Human Resources Director shall consider, among other factors, length of permanent service, performance appraisal ratings, availability of positions, budgetary restrictions, and equal employment opportunity. The specific procedures and qualifications established shall be listed in the flexible staffing examination announcement for the class(es) involved.

In view of the above, I am unable to uphold your appeal of the job announcement for 2903 Eligibility Worker. You may appeal this determination to the Civil Service Commission within five (5) business days from receipt of this notification. Your appeal and request for a hearing must be in writing or filed on the proper form (*CSC-12 – Appeal to the Civil Service Commission*).

Sincerely,



Micki Callahan
Human Resource Director
Department of Human Resources

c: Ted Yamasaki
Sandra Eng
John Kraus
Robert Thomas
Steve Ponder



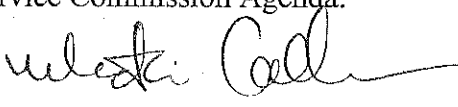
CIVIL SERVICE COMMISSION CITY AND COUNTY OF SAN FRANCISCO

CIVIL SERVICE COMMISSION REPORT TRANSMITTAL (FORM 22)

Refer to Civil Service Commission Procedure for Staff - Submission of
Written Reports for Instructions on Completing and Processing this Form

1. Civil Service Commission Register Number: 0355-12-4
2. For Civil Service Commission Meeting of: December ³/~~8~~, 2012
3. Check One: Ratification Agenda ___
 Consent Agenda ___
 Regular Agenda
 Human Resources Director's Report ___
4. Subject: Appeal by Sin Yee Poon, SEIU Union 1021, regarding the Job Announcement for class
2903 Eligibility Worker (CBT-2903-059333)
5. Recommendation: Deny the appeal.
6. Report prepared by: John C. Kraus Telephone number: 415-557-4884
7. Notifications: **(Attach a list of the person(s) to be notified in the format described in IV.**

Commission Report Format -A).

8. Reviewed and approved for Civil Service Commission Agenda:
Human Resources Director: 
Date: 10/26/12
9. Submit the original time-stamped copy of this form and person(s) to be notified
(see Item 7 above) along with the required copies of the report to:

**Executive Officer
Civil Service Commission
25 Van Ness Avenue, Suite 720
San Francisco, CA 94102**

10. Receipt-stamp this form in the ACSC RECEIPT STAMP box to the right using the time-stamp in the CSC Office.

CSC RECEIPT STAMP

ATTACHMENTS

- Attachment A: 2903 Eligibility Worker Job Announcement issued 9/14/2012 (CBT-2903-059333)
- Attachment B: Class Specification for 2903 Eligibility Worker
- Attachment C: 2903 Eligibility Worker Job Announcement issued 12/11/2009 (CBT-2903-056020)

CSC-22 (11/97)

- C: Donna Kotake, Department of Human Resources
Ted Yamasaki, Department of Human Resources
Robert Thomas, Human Services Agency
Elizabeth Jacobi, Department of Public Health
Steve Ponder, Department of Human Resources
Christina Penland, Department of Human Resources

**Form 22: Sin Yee Poon 2903 Eligibility Worker
Notification List**

Sin Yee Poon
SEIU Local 1021
350 Rhode Island St., 100 South
San Francisco, CA 94103

Robert Thomas, Human Resources
Human Services Agency
170 Otis Street
San Francisco, CA 94103

Elizabeth Jacobi, Human Resources
Department of Public Health
101 Grove Street
San Francisco, CA 94102

John Kraus
Department of Human Resources
1 South Van Ness Avenue, 4th Floor
San Francisco, CA 94103


Donna Kotake
Department of Human Resources
1 South Van Ness Avenue, 4th Floor
San Francisco, CA 94103




MEMORANDUM

DATE: October 26, 2012

TO: The Honorable Civil Service Commission

THROUGH: Micki Callahan, Human Resources Director 

FROM: John Kraus, Assistant Deputy Director 

SUBJECT: Appeal by Sin Yee Poon, SEIU Union 1021, regarding the Job Announcement for class 2903 Eligibility Worker (CBT-2903-059333) [CSC Register Numbers 0355-12-4]

1. SUMMARY OF THE APPEAL

SEIU Local 1021 representative, Sin Yee Poon, submitted a timely appeal on behalf of incumbents serving as 2903 Eligibility Workers and 2905 Senior Eligibility Workers (as well as incumbents in other titles described by Ms. Poon as "flexibly staffed classifications"). Ms. Poon believes that the job announcement for 2903 Eligibility Worker "deviates from the official job specification," thereby making it indistinguishable from an announcement for 2905 Senior Eligibility Worker. She asserts that this is a violation of Civil Service Rule 109.6 and requests that the current 2903 job announcement be rescinded and revised. She also requests that the Civil Service Commission take appropriate action to remedy any situations whereby City Departments use 2903 Eligibility Workers to perform the work of 2905 Senior Eligibility Workers.

2. AUTHORITY/STANDARDS

Charter Section 10.101 provides that the Civil Service Commission ("Commission") shall adopt rules, policies and procedures to carry out the civil service merit system provisions of the Charter, including but not limited to rules governing applications, examinations, eligibility and certification of eligibles, and classifications. Charter Section 10.102 provides that, pursuant to the policies, rules and procedures established by the Commission governing the merit system, the Department of Human Resources ("DHR") is the personnel department for the City and County of San Francisco, with responsibilities including: determining appointments on the basis of merit and fitness as shown by an appropriate test; authority over the recruitment, selection, certification and appointment of applicants/candidates/employees; and classification of positions.

Consistent with its authority under the Charter, the Commission adopted Rules 109, 110 and 111 governing Classification Specification, Examination Announcements and Examinations. Rules 109, 110 and 111 provide that the Human Resources Director has authority over the City's Classification Plan, Examination Announcements and the Examination Program respectively. With regard to Rule 110 in particular, the Human Resources Director has the authority to rule on all protests of examination announcements. The decision of the Human Resources Director regarding an examination announcement is final unless appealed to the Commission.

3. STANDARDS

Sec. 109.1 Authority

- 109.1.1** As provided under the Charter Section 10.103 of the City and County of San Francisco, the Human Resources Director shall have the duty and authority to establish a system of job classification and to allocate each position to a job class.
- 109.1.2** The Human Resources Director shall have the responsibility and authority to allocate new positions to a class based on the level and type of assigned duties as applicable under this Rule. Groups of positions form a class when it is determined by the Human Resources Director that the duties are at the same level of responsibility and authority.
- 109.1.3** The Human Resources Director, when notified of a significant change in duties, shall analyze positions. If it is determined by the Human Resources Director, through a job analysis, that the level and/or function of the assigned responsibilities have changed significantly and are no longer consistent with the existing class, the position will be reclassified.
- 109.1.5** The Human Resources Director has the authority to amend class specifications as necessary to reflect the major duties of positions within the class and the job related knowledge, skills and abilities necessary to perform the functions of the class.
- 109.1.6** The Human Resources Director has the authority to make changes to the Classification Plan including creating new classes, abolishing, consolidating or amending classes consistent with the Classification Plan.
- 109.1.7** The decision of the Human Resources Director regarding classification matters including the authority to determine the status of an employee, shall be final unless appealed to the Civil Service Commission.

Sec 109.2 Notice and Appeals

- 109.2.1** Any employee, employee representative or appointing officer affected by a classification action or status grant under this Rule may appeal the action to the Civil Service Commission. The appeal shall be in writing, stating the basis on which the appeal is based and shall be in accordance with the procedures established by the Executive Officer of the Civil Service Commission.
- 109.2.2** Proposed changes in classification and/or status of permanent civil service incumbents with existing status rights shall be posted for seven (7) calendar days. A day the Department of Human Resources is closed shall not be counted as the seventh (7th) calendar day. Proposed changes will become effective on the eighth (8th) calendar day following the posting date, with the following exception:

109.2.3 Protests shall be submitted to the Human Resources Director prior to the end of the posting period.

109.2.4 The decision of the Human Resources Director is appealable to the Civil Service Commission. The decision of the Civil Service Commission shall be final and not subject to reconsideration.

Sec. 109.6 **Class Specification**

109.6.1 The class specification shall be the official description of the class.

109.6.2 The class specification shall be descriptive of the class but shall not be considered as a restriction on the assignment of duties not specifically listed. The class specifications are intended to indicate the kind of positions that should be allocated to a class but shall not be construed as describing the exact duties and responsibilities of each individual position allocated to the class. In addition to defining the duties and characteristics of the class, the specifications shall give examples of the more significant and typical duties assigned to the positions in the class, the minimum requirements for applicants for the positions in the class, and any other special requirements. The appointing officer has the authority to assign an employee to perform work provided that it is consistent with the type of duties and level of responsibility of the employee's class, although not specifically described in the class specification.

Sec. 110.2 **Examination Announcements**

The examination announcement shall be the official notice of an examination and shall provide the qualifications, dates, and other particulars regarding the selection procedure. Applicants must be guided solely by the terms of the examination announcement.

Sec. 110.7 **Recruitment of Applicants**

Recruitment shall be conducted to attract qualified applicants and to maximize the multicultural, ethnic, and gender diversity of the workforce in the City and County of San Francisco. [...]

Sec. 110.4 **Appeals of Examination Announcements**

Appeals concerning the provisions of an examination announcement must be received by the Human Resources Director within five (5) business days from the issuance date. The Human Resources Director shall rule on all appeals and shall notify appellants in writing of the decision. This decision is subject to appeal to the Commission as provided elsewhere in these Rules.

Sec. 110.25 **Recruitment of Candidates**

The Department of Human Resources shall advertise and may take further appropriate means to interest suitable applicants.

Sec. 111.16 Authorization for Flexible Staffing Program

The Human Resources Director is authorized to establish flexible staffing programs to promote permanent civil service employees past the probationary period to higher classes within an occupational series or to another series by methods other than traditional selection procedures. In establishing a flexible staffing program, the Human Resources Director shall consider, among other factors, length of permanent service, performance appraisal ratings, availability of positions, budgetary restrictions, and equal employment opportunity. The specific procedures and qualifications established shall be listed in the flexible staffing examination announcement for the class(es) involved.

4. ISSUE

Should the job announcement for 2903 Eligibility Worker be amended and reposted to include language from the 2903 job specification which serves to differentiate the job of a 2903 Eligibility Worker from that of a 2905 Senior Eligibility Worker?

5. BACKGROUND

The Human Service Agency's job posting for 2903 Eligibility Worker was brought to Ms. Poon's attention on September 17, 2012. Upon reading the 2903 announcement, Ms. Poon was of the opinion that the 2903 job specification must have changed since it appeared to her that the language in the 2903 job announcement differed from that in the 2903 job specification. Given that proposed classification changes must be publicly posted for seven days per CSC Rule 109.2.2 prior to formal adoption of such changes, Ms. Poon wrote to Christina Penland, Classification Analyst with the Department of Human Resources, on 9/17/12 stating that she had not received notice of a classification posting regarding changes made to the 2903 job specification. Further, she requested that the 2903 job announcement "be put on hold immediately pending a meet and confer regarding any proposed changes" to the job specification.

Ms. Penland responded to Ms. Poon later that day explaining that the class specification for 2903 had not been revised and directed her to DHR's Recruitment and Assessment Services Unit if she had questions regarding the job announcement for 2903. Consequently, Ms. Poon wrote to Micki Callahan, Human Resources Director, to say that the job announcement for 2903 is inconsistent with the "type of duties and/or level of responsibility" of the official job specification for class 2903 and that this violates CSC 109.6 and 109.16. On behalf of the union, Ms. Poon requested that the 2903 "job announcement be rescinded and revised for re-posting," so that it is made consistent with the 2903 job specification.

On September 18, 2012, John Kraus, DHR's Director of Recruitment and Assessment Services, wrote to Ms. Poon to explain that, although the language in the 2903 job announcement was not taken verbatim from the 2903 job specification, it did accurately paraphrase the duties, knowledge and skills that are listed in the 2903 job specification. It was explained also that the announcement was intended to recruit applicants for positions in the both the Department of Public Health and the Human Services Agency (HSA) and, therefore, the announcement's format was structured to separately describe an Eligibility Worker's duties in

each department. It was also pointed out that the same language was used to describe job duties in an earlier 2903 announcement posted by HSA in 2009. However, no protests or challenges were received at that time.

Finally, Ms. Poon was informed that it is unnecessary to include language in a job announcement that helps distinguish the target class from other classes. Unless she was able to identify any job duties that didn't belong in the actual 2903 job announcement or key duties that were omitted, there was no basis to rescind the announcement or delay the examination process for 2903 Eligibility Worker.

Ms. Poon was given an opportunity to challenge this decision by appealing to the Human Resources Director, which she did on 9/21/12. In her brief restatement of her appeal, she added that 2903 Eligibility Worker is a training and feeder class whereby employees can advance to the 2905 Senior Eligibility Worker level via flexible staffing.

The Human Resources Director responded to Ms. Poon's protest on 9/26/12, explaining that the job specification and the job announcement are documents used for different purposes. The former is used primarily for classification and the latter is used for recruitment. While the job duties for a given class generally should not differ significantly when described in these documents¹, there is no requirement that a job announcement replicate a job specification in its entirety. Therefore, Ms. Poon's request that the distinguishing features between the 2903 and 2905 classifications be incorporated into the 2903 job announcement was rejected and she was given appeal rights to the Civil Service Commission.

DISCUSSION AND ANALYSIS

The purpose of a job announcement is to provide sufficient information about the target job (i.e., job tasks, duties, activities) to attract qualified job seekers and to allow them to assess whether the job opportunity is of interest to them. This is clearly pointed out in CSC 110.7 wherein it is stated that, "Recruitment shall be conducted to attract qualified applicants....", as well as in CSC 110.25 which states that, "The Department of Human Resources shall advertise and may take further appropriate means to interest suitable applicants."

To this end, the job announcement for 2903 Eligibility Worker provided salary information, descriptions of job tasks, duties and/or worker characteristics, minimum experience and education requirements needed to perform the job, the selection procedure(s) used to assess applicants, etc. That is, all of the information in the 2903 Eligibility Worker announcement was appropriate because it allowed job seekers to determine whether their interest, abilities and/or qualifications aligned with the job and the selection procedures under which they must compete.

Ms. Poon believes that 2903 job announcement was deficient because it did not include language that distinguishes the 2903 Eligibility Worker job from that of a 2905 Senior Eligibility Worker. Specifically, Ms. Poon points out that the 2903 job specification refers to the Eligibility Worker job as "the entry level class in the Eligibility Worker series" and that it "is typically used as a training class." She also refers to language in the job specification which states that the 2903 Eligibility Worker is "distinguished from the 2905 Senior Eligibility Worker and 2908 Hospital Eligibility Worker by tasks and duties being performed under closer supervision." Finally, the 2903 job specification includes language that states that positions in

¹ Exceptions are possible in PBT recruitments or recruitments involving special conditions associated with specialty areas.

the 2905 Senior Eligibility “class are flexibly staffed and are normally filled by advancement from the class 2903 level....”

It should be noted that Ms. Poon does not dispute the type or number of tasks or duties that were described in the 2903 job announcement. Rather, she believes that the 2903 job announcement omitted a few statements found in the 2903 job specification which help to distinguish the 2903 job from the 2905 job. Yet, she has not explained why job seekers must know this “distinguishing information” when deciding whether to apply for a 2903 job, or why this additional information is essential for attracting qualified applicants. Rather, she asserts that these omissions are a violation of CSC Rule 109.6. Since this rule pertains to job specifications, not job announcements, it appears that Ms. Poon expects a job announcement to replicate the class specification. Otherwise, it is not clear how a job announcement posting can violate a rule that pertains to a job specification.

In Ms. Poon’s 10/4/12 appeal to the Civil Service Commission, she argues that the “distinguishing information” was intentionally left out of the 2903 job announcement by the Human Services Agency so that it can later hire eligibles from the resulting 2903 eligible list and assign them 2905 job duties. She says that this is possible because the 2903 and 2905 job specifications essentially define both classes as performing the same tasks and duties and that only the “distinguishing information” previously mentioned sets them apart. This argument is misplaced as it is the job specification, not the job announcement, which controls position classification. If the Human Services Agency were to assign an employee or group of employees duties outside of their proper classification, such an action would be appealable as described in CSC Rule 109. Further, if Ms. Poon believes that the 2903 or 2905 job specifications are so similar as to allow misclassifications to take place or to allow abuse with respect to job assignments, then she is free to challenge the class specifications themselves. In other words, Ms. Poon’s appeal of the 2903 job announcement is misdirected.

Finally, Ms. Poon has brought this appeal forward on behalf of incumbents of the flexibly staffed classifications. A flexible staffing program allows for the advancement of employees to a higher class, without traditional examination or competition, typically after the employees have served a minimum period of time in the lower, entrance class. Clearly, such a program is advantageous to employees that hold titles in the entrance class of a flexible staffing program. According to CSC Rule 111.16, the authority to implement a flexible staffing program resides with the Human Resources Director on an announcement-by-announcement basis and such a program was not initiated in association with the current 2903 Eligibility Worker announcement (CBT-2903-059333). Therefore, it appears that Ms. Poon’s advocacy for including “distinguishing information” (i.e., that 2903 is an entrance, training and flexibly-staffed class) in the 2903 job announcement may be intended to advance the idea that Eligibility Worker is solely a “transitional” class in which employees temporarily serve and only to the extent that they are being trained. Reinforcing such an idea, of course, helps those who would like to see flexible staffing programs implemented in the future.

Again, in this instance, flexible staffing is not being implemented and, therefore, there is no need to refer to it in the 2903 job announcement. Also, the announcement does identify the examination type as “entrance” and explains that incumbents receive general supervision. Most job seekers expect to be trained when hired. Consequently, it is unclear why Ms. Poon feels that there may be abuse in the job assignments of 2903 hires

based on the language in the 2903 job announcement. If she wishes to challenge the decision not to implement the flexible staffing program or to challenge the use of the 2903 and 2905 classifications, those are separate matters from the 2903 job announcement and should be addressed accordingly.

CONCLUSION AND RECOMMENDATION

A job announcement is not a job specification. The former is used to recruit and attract job applicants and the latter is used primarily for classification purposes. Consequently, there is no requirement that a job announcement include all of the information contained in a job specification. In fact, Civil Service Rule 110.2 concerning examination announcements does not require information which compares one class to another to be incorporated into a job announcement. Rather, this information belongs in the job specification because job differentiation is a classification matter. However, it should be emphasized that the duties of a 2903 Eligibility Worker employed at the Human Services Agency were described accurately in the job announcement based on the class specification. Therefore, the appellant's claim that the Eligibility Worker announcement (CBT-2903-059333) violated CSC Rule 109.6, a rule which concerns class specifications, is incorrect. While the appellant believes that eligibles appointed from the list resulting from this announcement could be given assignments outside the scope of a 2903 Eligibility Worker, this is simply speculation at this time. Moreover, she is reminded that matters concerning misclassification can be appealed under Civil Service Rule 109.

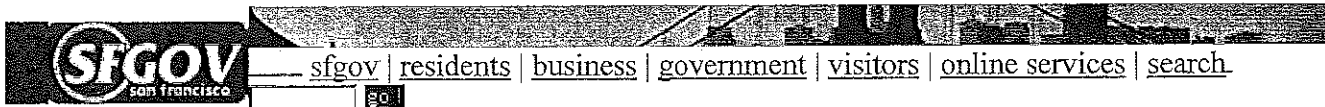
There is insufficient basis to rescind the job announcement and suspend the current selection process for 2903 Eligibility Worker (CBT-2903-059333). We therefore respectfully request that the Commission deny this appeal.

ATTACHMENTS

- Attachment A: 2903 Eligibility Worker Job Announcement issued 9/14/2012 (CBT-2903-059333)
- Attachment B: Class Specification for 2903 Eligibility Worker
- Attachment C: 2903 Eligibility Worker Job Announcement issued 12/11/2009 (CBT-2903-056020)

- C: Donna Kotake, Department of Human Resources
Ted Yamasaki, Department of Human Resources
Robert Thomas, Human Services Agency
Elizabeth Jacobi, Department of Public Health
Steve Ponder, Department of Human Resources
Christina Penland, Department of Human Resources

Attachment A



Current Job Openings | My Applications | Update Contact Info | Job Descriptions/Future Openings | Dept of Human Resources

SAN FRANCISCO

2903 Eligibility Worker

(Human Services Agency/Department of Public Health)
Recruitment #CBT-2903-059333

Department:	Human Services Agency
Analyst:	Richard Hodgkinson
Date Opened:	9/14/2012 8:00:00 AM
Filing Deadline:	9/21/2012 5:00:00 PM
Salary:	\$51,844.00 - \$63,024.00/year
Job Type:	CBT Discrete
Employment Type:	Full-Time

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INTRODUCTION

When assigned to the Human Services Agency, incumbents under general supervision perform a variety of duties in order to make eligibility determinations for public assistance in a variety of human service programs and to provide required services to clients from diverse cultural and socio-economic backgrounds.

The essential job functions include the following: assisting clients with the completion of applications and forms; answering a variety of questions regarding information requested on applications; helping clients gather needed and required information and documentation; interpreting and enforcing federal, state, and local laws and regulations pertaining to eligibility determination; explaining regulations and procedures to clients and others as necessary; speaking and working with clients from diverse backgrounds who may be mistrustful, hostile, mentally and/or physically ill; completing and organizing a large number of forms; meeting required deadlines in all phases of the job; utilizing Windows based systems by entering information into appropriate data/inquiry fields and windows; providing outreach services; making home visits; making referrals for client services to other social services programs and community agencies; writing case narratives, memos, letters; filing and maintaining detailed case records; reviewing computer reports in order to update caseload eligibility and manage workflow. All these functions must be performed within strict time frames according to assigned program policies and procedures. Performs other related duties as assigned/required.

When assigned to the Department of Public Health, Eligibility Workers will work at various public health facilities throughout the City. Incumbents work under general supervision, perform a variety of eligibility and related clerical and administrative duties. The nature of these positions requires employees to work various shifts including, PM shifts, and Midnight shifts. Employees may also work weekends and holidays.

The essential job functions include the following: performs eligibility and registration functions to secure maximum reimbursement; interviews applicants, clients or other representatives to acquire detailed personal or confidential information; initiate a total-household assistance interview to determine eligibility for financial assistance under the terms of various Federal, State or County Health Care Programs; enters demographic and financial information on the computer; assists with the completion of applications and forms; obtains information from and provides information to applicants; interprets and enforces Federal, State and local regulations; assists with authorization for care or transfer of patients; initiates and processes work through an automated system; plans and organizes accordingly to ensure work is completed in accordance with regulations relating to eligibility and timeliness; reviews eligibility factors and re-computes benefit amounts periodically according to prescribed time intervals as required by the appropriate program; participates in special projects, studies, or work assignments; answers phones and schedules patient appointments; assists patients with special needs due to disability, illness, physical, age and/or language limitations; provides excellent customer service to clients and coworkers by remaining courteous and helpful at all times. Performs other related duties as assigned/required.

MINIMUM QUALIFICATIONS

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1. Two (2) years of direct public contact clerical work experience which must have included the following: use of computer applications to input, retrieve and analyze information; working with a diverse client population; performing responsibilities involving interviewing to acquire detailed personal or confidential information; interpreting and applying rules, regulations and policies; creating and processing documents related to financial or personal histories of clients; and assisting clients with the completion of forms or correspondence;

OR

2. One (1) year of experience determining eligibility for health and/or social services programs, loans, financial assistance, unemployment or veterans benefits;

OR

3. Sixty (60) semester units or ninety (90) quarter units from an accredited college or university.

Substitution: Thirty (30) semester units or forty-five (45) quarter units from an accredited college or university may substitute for one (1) year of the work experience under qualification pattern number one (1) above.

ALL APPLICANTS MUST POSSESS THE REQUIRED MINIMUM QUALIFICATIONS AT THE TIME OF FILING

HOW TO APPLY

Applications for City and County of San Francisco jobs are being accepted through an online process. Visit www.jobaps.com/sf to register an account (if you have not already done so) and begin the application process.

- Select the desired job announcement
- Select "Apply" and read and acknowledge the information
- Select either "I am a New User" if you have not previously registered, or "I have Registered Previously"
- Follow instructions on the screen

If you are a current CCSF employee with permanent status in Class 2903 Eligibility Worker and wish to be considered for transfer or reinstatement to a position in the same classification within the department/agency for which this announcement has been issued, you must submit an Employee Request for Transfer form (see <http://sfdhr.org/Modules/ShowDocument.aspx?documentid=11618> or an Employee Request for Reinstatement form.

Computers are available for the public (from 8:00 a.m. to 5:00 p.m. Monday through Friday) to file online applications in the lobby of the Dept. of Human Resources at 1 South Van Ness Avenue, 4th Floor, San Francisco.

Applicants may be contacted by email about this announcement and, therefore, it is their responsibility to ensure that their registered email address is accurate and kept up-to-date. Also, applicants must ensure that email from CCSF is not blocked on their computer by a spam filter. To prevent blocking, applicants should set up their email to accept CCSF mail from the following addresses (@sfgov.org, @sfdpw.org, @sfport.com, @flsfo.com, @sfwater.org, @sfdph.org, @asianart.org, @sfmta.com).

Applicants will receive a confirmation email that their online application has been received in response to every announcement for which they file. Applicants should retain this confirmation email for their records. Failure to receive this email means that the online application was not submitted or received. All work experience, education, training and other information substantiating how you meet the minimum qualifications must be included on your application by the filing deadline. Information submitted after the filing deadline will not be considered in determining whether you meet the minimum qualifications. Applications completed improperly may be cause for ineligibility, disqualification or may lead to lower scores.

If you have any questions regarding this recruitment or application process, please contact the exam analyst, Richard Hodgkinson, by telephone at 415-557-5573 or by email at Richard.Hodgkinson@sfgov.org

SELECTION PLAN

WRITTEN EXAMINATION (Weight – 100%)

Candidates will be administered a written multiple-choice test designed to measure knowledge, skills and/or abilities in job-related areas which may include but are not limited to:

- Ability to establish and maintain effective and cooperative working relationships, and to effectively work with others
- Ability to interview clients
- Ability to communicate written information in a clear and concise manner to clients and staff
- Ability to read, review, and evaluate written information
- Ability to file, prepare, organize and maintain records
- Ability to use mathematical formulas.

- Ability to comprehend and interpret written information
- Knowledge and ability to interpret policies, rules, and procedures

This is a standardized examination and, therefore, test questions and test answers are not available for public inspection or review.

Special Condition Bilingual Proficiency:

Some positions may require bilingual proficiency in a variety of languages depending on the department's bilingual needs. Only those eligibles who pass the bilingual proficiency test will be considered for bilingual positions. Applicants must indicate on the application the language(s) in which they claim proficiency

Requests:

Applicants with disabilities who meet the minimum eligibility requirements for this job announcement can find information on requesting a reasonable ADA Accommodation at:

<http://www.sfdhr.org/index.aspx?page=20#applicantswithdisabilities>

Information regarding requests for Veterans Preference can be found at:

<http://www.sfdhr.org/index.aspx?page=20#veteranspreference>

Verification:

Applicants may be required to submit verification of qualifying education and experience at any point in the application, examination and/or departmental selection process. Note: Falsifying one's education, training, or work experience or attempted deception on the application may result in disqualification for this and future job opportunities with the City and County of San Francisco. For more information on verification, please visit the following link:

<http://www.sfdhr.org/index.aspx?page=20#verification>

Certification Rule:

The certification rule for the eligible list resulting from this examination will be Rule of Three Scores. Additional selection processes will be conducted by the hiring department prior to making final hiring decisions.

Eligible List:

The eligible list resulting from this examination is subject to change after adoption (e.g., as a result of appeals), as directed by the Human Resources Director or the Civil Service Commission.

The duration of the eligible list resulting from this examination process will be 24 months, and may be extended with the approval of the Human Resources Director.

General Information concerning City and County of San Francisco Employment Policies and Procedures:

Important Employment Information for the City and County of San Francisco can be obtained at

<http://www.sfdhr.org/index.aspx?page=20> or hard copy at 1 South Van Ness Avenue, 4th Floor.

Terms of Announcement:

Applicants must be guided solely by the provisions of this announcement, including requirements, time periods and other particulars, except when superseded by federal, state or local laws, rules or regulations. Clerical errors may be corrected by the posting the correction on the Department of Human Resources website at www.jobaps.com/sf.

Copies of Application Documents:

Applicants should keep copies of all documents submitted, as these will not be returned.

Right to Work:

All persons entering the City and County of San Francisco workforce are required to provide verification of authorization to work in the United States.

Exam Type:

Entrance

Issued: 9/14/12

Micki Callahan, Human Resources Director

Department of Human Resources

Recruitment ID Number: CBT-2903-059333

HSA/RH/415.557.5573

DISASTER SERVICE WORKERS

All City and County of San Francisco employees are designated Disaster Service Workers through state and local law (California Government Code Section 3100-3109). Employment with the City requires the affirmation of a loyalty oath to this effect. Employees are required to complete all Disaster Service Worker-related training as assigned, and to return to work as ordered in the event of an emergency.

BENEFITS

All employees hired on or after January 10, 2009 will be required (pursuant to San Francisco Charter Section A8.432) to contribute 2% of pre-tax compensation to fund retiree healthcare. In addition, most employees are required to make a member contribution towards retirement, typically a 7.5% of compensation. For more information on these provisions, please contact the personnel office of the hiring agency.

For more information about benefits, please [click here](#).

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Contact us via
conventional means.

You may contact us by phone at (415) 557-4800, or apply for a job in
person at the Department of Human Resources.

[contact us](#) | [accessibility policy](#) | [disclaimer](#) | [privacy policy](#)

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Attachment B**Department of Human Resources****Eligibility Worker (#2903)****\$24.93-\$30.30 Hourly / \$4,320.00-\$5,252.00 Monthly / \$51,844.00-\$63,024.00 Yearly**

Email Me when a Job Opens for the above position(s)

Definition

Under general supervision, to perform a variety of technical duties in the review and determination of initial and continuing client eligibility for a variety of public assistance programs.

Distinguishing Features

Positions in this classification are responsible for carrying out well defined rules and regulations pertaining to various categorical aid programs and explaining them to applicants and the general public. Positions in this class have regular contacts with clients, their relatives, and representatives of outside agencies and the public.

2903 Eligibility Worker This is the entry level class in the Eligibility Worker series. This class is distinguished from the 2905 Senior Eligibility Worker and 2908 Hospital Eligibility Worker by tasks and duties being performed under closer supervision. Since this class is typically used as a training class, employees may have only limited or no directly related work experience.

2905 Senior Eligibility Worker Employees within this class are distinguished from the 2903 Eligibility Worker by the performance of the full range of duties as assigned. 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. Positions in this class are flexibly staffed and are normally filled by advancement from the class 2903 level, or when filled from the outside, require prior related work experience.

The 2905 class is distinguished from the 2908 Hospital Eligibility Worker in that the 2908 identifies and determines client eligibility for medical coverage under the terms of various private health plans and public assistance programs, whereas the class 2905 determines client eligibility for public assistance programs and certifies for reimbursement.

Additionally, the 2905 class is distinguished from the 2913 Program Specialist in that the 2913 class performs higher level technical assignments than the 2905 class.

Examples of Important and Essential Duties

"The class specification shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 7)

1. Schedule and interview clients in the offices of the Department of Social Services, in the client's home, or in hospitals and various institutions to determine new or continuing program eligibility.
2. When assigned to hospital, admit and register patients for hospital care; obtain demographic information.
3. Coordinate transfers of patients between counties; inform clients of procedures and necessary reports.
4. Explain eligibility programs, qualification standards, policy and procedure to clients; assist clients in completion of applications, forms and reports when necessary; review and evaluate applications for completeness and accuracy; prepare client budget to determine eligibility.

5. Apply legal criteria to determine eligibility; provide recommendations regarding financial eligibility for assistance programs; determine eligibility and grant amount according to established policies and procedures; review and determine re-certification.
6. Prepare case records related to client eligibility information and financial assistance received; update case records; submit required reports.
7. Investigate statements and information received from applicant through the use of telephone or written verifications.
8. Investigate and resolve client problems involving non-receipt of benefits.
9. Review cases with supervisor in assessing the quality of the eligibility determination process and procedure.
10. Compose and prepare correspondence to clients, referencés, and State agencies; gather statistical data and prepare reports as required.
11. Answer questions and provide information to clients and the general public regarding assigned program area.
12. Refer clients in need of case work services to members of social service staff; may provide limited referrals to resources within the community on matters related to income maintenance; refer clients to appropriate agencies according to established procedures.
13. Perform related duties as required.

Knowledge, Skills and Abilities

Knowledge, Abilities, and Skills: Knowledge of: Basic interviewing and investigative skills and techniques; office procedures, methods and computer equipment; basic mathematics.

Ability to: Learn departmental programs, policies, procedures and terminology; learn principles and procedures of record keeping; learn to interpret and apply pertinent Federal, State, local and departmental laws, rules, regulations, policies and procedures regarding assigned program; learn to plan, organize and prioritize caseload; learn to interview applicants for public assistance and obtain confidential information relative to personal, family, financial, medical or other circumstances of client relating to eligibility; learn to evaluate data and provide recommendations on eligibility of client; maintain accurate records and meet program deadlines; operate a computer terminal and standard office machines; make accurate mathematical computations; type and enter data at a speed necessary for successful job performance; effectively communicate with and elicit information from clients in difficult situations; apply Federal, State, and local Equal Employment, Affirmative Action, and Civil Rights laws, procedures, and regulations; communicate clearly and concisely, both orally and in writing; establish and maintain cooperative working relationships with those contacted in the course of work.

Knowledge of: Principles and practices of caseload management; Federal, State, local laws, rules, regulations, policies, and procedures regarding assigned program area; services offered by related agencies; departmental programs, policies, procedures and terminology.

Ability to: Interview applicants for public assistance and obtain appropriate information, often in different languages, or dialects of English; accurately gather, record and evaluate data necessary for the determination of eligibility; interpret and apply Federal, State and local policies, procedures, laws and regulations; work independently with minimal supervision.

Notes

Amended: 3/15/93

Disaster Service Workers

All City and County of San Francisco employees are designated Disaster Service Workers through state and local law (California

Government Code Section 3100-3109). Employment with the City requires the affirmation of a loyalty oath to this effect. Employees are required to complete all Disaster Service Worker-related training as assigned, and to return to work as ordered in the event of an emergency.

CLASS: 2903
EEOC: 3

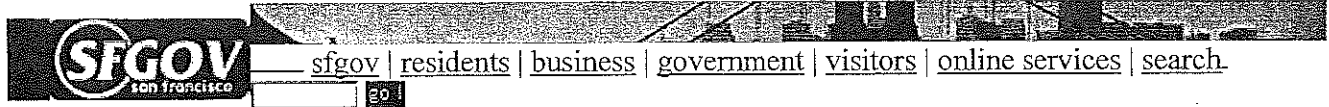
EST:

REV:
MEDICAL:

FORMERLY JOB TITLE:

REPLACES JOB TITLE:

Attachment C



Current Job Openings | My Applications | Update Contact Info | Job Descriptions/Future Openings | Dept of Human Resources

SAN FRANCISCO

2903 Eligibility Worker

Recruitment #CBT-2903-056020

Specialty: Announcement Posted for Information Purposes Only
 Department: Human Services Agency
 Analyst: Richard Hodgkinson
 Date Opened: 12/11/2009 8:00:00 AM
 Filing Deadline: 12/18/2009 5:00:00 PM
 Salary: \$48,906.00 - \$59,462.00/year
 Job Type: CBT Discrete
 Employment Type: Full-Time

[Go Back](#) [View Benefits](#)

INTRODUCTION

Applications for this recruitment process will be **available through an online process and for ONE DAY ONLY on Friday, December 18, 2009 from 8:00 am. to 5:00 pm.**

Under general supervision performs a variety of duties in order to make eligibility determinations for public assistance in a variety of human service programs and to provide required services to clients from diverse cultural and socio-economic backgrounds. The essential functions include: assist clients with the completion of applications and forms and answer questions regarding information requested on applications; help clients gather needed information and documentation; interpret and enforce federal, state, and local laws and regulations pertaining to eligibility determination; explain regulations and procedures to clients and others as necessary; speak and work with clients with diverse background who may be mistrustful, hostile or, mentally or physically ill; complete and organize large number of forms; meet required deadlines in all phases of the job; **utilize PC and Windows based system;** by entering information using a computer into appropriate data/inquiry fields and windows; providing outreach services; making home visits; make referrals for client services to other social services programs and community agencies; write case narratives, memos, letters; file and maintain detailed case records and review computer reports to update caseload eligibility and manage workflow. All these functions must be performed within strict time frames according to assigned program policies and procedures. Performs other related duties as required.

MINIMUM QUALIFICATIONS

- Two (2) years (4000 hours) of experience directly serving a diverse client/customer population on a daily basis; interviewing client/customers to acquire detailed personal or confidential information; interpreting and applying rules, regulations and policies; creating and processing documents related to financial or personal histories of clients/customers; assisting clients/customers with the completion of forms or correspondence; and, one (1) year of experience using computer applications to input, retrieve, and analyze information. **OR**
- One (1) year (2000 hours) of experience as an Eligibility Worker in a county or state administered welfare program. This experience must be equivalent to 12 months of full time work performed by 2903 Eligibility Worker in the City and County of San Francisco.

ALL APPLICANTS MUST POSSESS THE REQUIRED MINIMUM QUALIFICATIONS AT THE TIME OF FILING.

Substitution:

Candidates qualifying under Minimum Qualification #1 may substitute two years of educational coursework from an accredited college or university (60 semester or 90 quarter units) for one year of experience. At least 12 semester units or 18-quarter units must be in behavioral sciences (social work, sociology, psychology, cultural anthropology or closely related discipline). Four years of educational coursework from an accredited college or university (120 semester units or 180 quarter units) may substitute for all the required experience, if at least 24 semester units or 36-quarter units are in behavior science.

HOW TO APPLY

Applications for this recruitment process will be **available through an online process and for ONE DAY ONLY on Friday, December 18, 2009 from 8:00 am. to 5:00 pm.**

Visit www.jobaps.com/sf to begin the application process by registering an account.
Click and select the desired job announcement
Click on "Apply" and read and acknowledge the information
Click on "I am a New User"
Follow instructions given on the screen.

Verification:

Verification of qualifying education and experience may be required at any point in the selection process or prior to appointment. Failure to submit the required verification, if requested, may result in rejection of the application, rescinding of job offers or ineligibility of employment and removal from the current eligible list. All statements made on the application or subsequent documents required under this examination are subject to verification.

SELECTION PROCEDURES

Written Examination**100%**

Candidates will be tested to determine their relative knowledge, skills and abilities in job related areas. These may include but are not limited to knowledge of principles and techniques of interviewing, ability to interpret and apply rules, regulations and policies, knowledge of basic mathematics.

Certification Rule:

The certification rule for the eligible list resulting from this selection procedure will be Rule of Three (3) Scores.

General Notes:

1. Applicants are advised to keep copies of applications and all documents submitted. Submitted documents become a permanent part of the exam record and will not be returned. Hiring departments or programs may require applicants to complete and present additional documents at the time of appointment/job offer and/or at a later date.
2. For positions which require possession of a current California class 3C driver license, a current copy of the driver license and a current Motor Vehicle Record (MVR) must be submitted prior to appointment. Applicants for positions which require a current driver license must possess and maintain a good driving record, defined as not having their driving privilege suspended, revoked, or being placed on probation by the DMV for a cause involving the safe operation of a motor vehicle within the preceding three (3) years. Violations will be reviewed on an individual basis and may be caused for non-selection or disciplinary action up to termination or removal from position, if employed.
3. Some positions require bilingual fluency in other languages **in addition to English.** Language

proficiencies must be indicated on the front of the application. Candidates who indicate bilingual ability will be required to demonstrate language proficiency in reading, writing and speaking prior to appointment to a bilingual position.

4. Applicants with disabilities requiring reasonable accommodation for this process must contact the analyst by phone at (415) 557-5688, or if hearing impaired at (415) 775-9484 (TDD), or in writing (specify Class 2903) at the address listed above as soon as possible.
5. Prior to appointment, at the Department's expense, applicants must take a TB screening test, and a medical examination.

Entrance

Micki Callahan, Human Resources Director

Department of Human Resources

Announcement #: 056020

Issued: December 11, 2009

Contact Information: MGB, HSA (415) 557-5688

DISASTER SERVICE WORKERS

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BENEFITS

All employees hired on or after January 10, 2009 will be required (pursuant to San Francisco Charter Section A8.432) to contribute 2% of pre-tax compensation to fund retiree healthcare. In addition, most employees are required to make a member contribution towards retirement, typically a 7.5% of compensation. For more information on these provisions, please contact the personnel office of the hiring agency.

Contact us via
conventional means.

You may contact us by phone at (415) 557-4800, or apply for a job in person at the Department of Human Resources.

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**ADDITIONAL INFORMATION
SUBMITTED BY APPELLANT**

Civil Service Commission Appeal

RE: 2903 Job Announcement

Supplemental Materials

This appeal is ostensibly about a job announcement for an examination of a flex series classification, but it is only the tip of the proverbial iceberg.

We believe that City Management has taken a series of “informal” actions modifying many classification processes in violation of Civil Service Rules.

As these are “informal” actions, it is not possible to protest or to appeal “classification decisions” when there are no announcements or disclosure of informal actions taken.

That is the reason for this appeal. We believe that City Management has taken informal classification actions in violation of Civil Service Rules and Merit System processes.

The cycle of these “informal actions” begin with the job announcement of a flex class examination:

- ◆ City Management has made the “decision” to modify the description of the job duties of the lower flex classification, like the 2903 Eligibility Specialist, in job announcements to inaccurately reflect the type of duties and the level of responsibility of the classification.
 - The job specs of the upper and lower flex classes are essentially identical, except of the section entitled: “Distinguishing Features.”
 - Without including the “Distinguishing Features” portion of the job specs, the announcement for the lower flex (ex: 2903) and for the higher flex (ex: 2905) are exactly the same.
 - The informal decision to issue identical job announcements for both the higher flex and the lower flex was made without disclosure or posting, disallowing protests and appeals.
- ◆ Additionally, a companion “informal” classification decision was made to stop funding, stop allocating, and stop hiring at the upper flex level (ex: 2905), again without disclosure or posting, disallowing any protest or appeal.

- ◆ Based on these “modified” job announcements, City Management then go on to hire at the rate of the lower flex (ex: 2903) and assigning the work of the upper flex (ex:2905), thereby violating Civil Service Rules specifying the type of duties and level of responsibilities of each class.

- ◆ These related actions of removing the Distinguishing Features, the refusal to fund the upper flex classes (ex: 2905), and the ongoing assignment of the upper flex duties (ex: 2905) to the lower flex classification amount to
 - A de facto amendment of the class specs, removing the “Distinguishing Features,” and rendering description of the upper and lower flex class identical
 - A de facto “Consolidation” of upper and lower flex classes into one, and/or the “abolishment” of the upper flex classes

All are without process and all are in violation of Civil Service Rules. Additionally, these actions also violation provisions for the “temporary” assignment of out of class work and the authority to assign work “provided” that is it consistent with the type of duties and level of responsibility of the employee’s class.

Specifically, we believe City Management has violation Civil Service Rules, including but not limited to the following Sections:

- ◆ 109.1.1, 109.1.2, 109.1.3
- ◆ 109.2.1
- ◆ 109.3.6
- ◆ 109.3.8
- ◆ 109.3.11
- ◆ 109.3.16
- ◆ 109.3.18, 109.3.19, 109.3.20
- ◆ 109.4
- ◆ 109.5
- ◆ 109.6.1
- ◆ 109.8.2
- ◆ 109.9
- ◆ 109.16.1, 109.16.2, [particularly 109.16.2. 4)]

We ask the Commission to investigate and rule these classification actions without disclosure, posting, opportunities for protest and appeal, beginning with the removal of the essential provisions of job specifications – rendering the job announcements of the lower flex classes identical to that of the upper flex – in violation of Civil Service Rules, to disallow all such classification decisions without process, and to make whole any and all employees so adversely affected by these actions in violation of the Rules.

**Commissioners'
Announcements/
Request**

Adjournment