

County of Santa Clara

Employee Services Agency

Human Resources

County Government Center, East Wing
70 West Hedding Street, 8th Floor
San Jose, California 95110



Classification Report

Date: April 2, 2024

To: Riko Mendez, Chief Elected Officer
SEIU Local 521

From: Trudy Felix, Management Analyst
Employee Services Agency-Human Resources

Reviewed by: Laura Salas, Human Resources Manager

Subject: Classification Report – Reclassification of Office Specialist III to Account Clerk II – Budget Unit 0921

Background

During the 2023 Classification Window, four (4) Office Specialist IIIs in the Santa Clara Valley Healthcare (SCVH) Facilities Department submitted a request to be evaluated on whether they were properly classified and determine if they should be reclassified to Account Clerk IIs. In accordance with the Memorandum of Understanding between the County and Service Employees International Union Local 521 (SEIU Local 521), the Labor-Management Committee accepted the request to conduct a classification study. Employee Services Agency – Human Resources (ESA-HR) conducted the study.

The SCVH Facilities Department consists of one (1) Facilities Director, one (1) Telecom/Facilities Manager, one (1) Administrative Support Officer II, four (4) OSIIIs, and one (1) Administrative Assistant positions. The incumbents report directly to the Administrative Support Officer II, who reports to the Telecom/Facilities Manager, who reports to the Facilities Director.

Findings / Analysis

In addition to the information provided in the PCQ, a desk audit was conducted to gather specific details of the incumbents' duties and responsibilities.

The Office Specialist III classification is defined as, “Under limited supervision, to perform a wide variety of moderately complex and responsible assignments requiring comprehensive knowledge of subject matter, organizational activities, and operations.”

The Office Specialist III classification is further distinguished by requiring a mastery of common office software applications and understanding and applying a body of specialized knowledge of a program area in initiating and independently performing assignments. The specialized body of

Board of Supervisors: Sylvia Arenas, Cindy Chavez, Otto Lee, Susan Ellenberg, S. Joseph Simitian
County Executive: James R. Williams

knowledge is substantial and may require an extended period of time to learn. Some positions in the class have extensive public contact often under extreme or stressful conditions.

Approximately seventy-five percent (75%) of their time is spent compiling, verifying, and summarizing moderately complex accounting and financial data from their supervisor, managers for various locations, vendors, FAF, and contractors on behalf of the Facilities enterprise-wide units. Incumbents perform accounts payable functions, conduct research, and ensure data accuracy. Further, the incumbents create requisitions and then converts them into purchase orders using SAP, Ariba, or PMM17. Additionally, they receive orders to get them processed for payment by the Finance Department.

The remaining twenty-five percent (25%) of the incumbents' time is spent researching invoices and troubleshooting accordingly, maintaining an internal database, and performing timekeeping functions.

The Account Clerk II classification is defined as, "Under supervision, to compile, verify, and summarize moderately complex accounting and financial data from a wide variety of sources for an accounting operational unit."

The Account Clerk II classification is further distinguished from the Accountant Assistant classification in that the Accountant Assistant prepares more complex and varied reports at a broader level of control covering entire funding projects, or provides controls and review of County-wide accounting systems, and works under the direction of a professional accountant.

The incumbents verify purchases and invoices in databases to ensure utilities for Saint Louise Hospital, O'Connor Hospital, and SCVH have been paid and are up to date to prevent service interruption. They research invoices to verify there is an approval and, once approved they are routed to Finance for payment. They complete the purchasing for the Facilities/BioMed Department. The purchases need to be made in a timely matter to maintain compliance for Joint Commission accreditation (JCAHO) requirements and to comply with patient care & safety regulations. The incumbents match purchase orders to freight shipments and validate and update purchase orders as needed to accurately capture any changes. They conduct research with the departments to ensure they received their items ordered. Incumbents help facilitate the tracing on items if they are not able to locate and/or validate items were received. The incumbents work with the vendors for quotes and purchase orders and also work with Finance, Management, and Facilities staff to ensure that all processes are followed, and that purchase orders are accurately consolidated and tracked. These duties are consistent with the definition of Account Clerk II. Therefore, it is recommended to reclassify the incumbents from the Office Specialist III to Account Clerk II classification.

At implementation, salary placement will be in accordance with Personnel Practice A25-661, and the incumbents will be placed on probationary status as indicated by Merit System Rule A25-103. The recommended action does not create compaction.

Recommendations

- Add four (4) Account Clerk II positions to BU 0921;
- Reclassify four (4) Office Specialist III incumbents to Account Clerk II in BU 0921;
- Delete four (4) Office Specialist III positions in BU 0921.

Fiscal Implications

The recommended reclassification would result in an annualized cost of approximately \$3,985.