NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY THE HUMAN RESOURCES DIRECTOR

The following actions are being posted in accordance with Rule 109. In the absence of requests to meet addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 19

Fiscal Year: 2009/2010

Posted Date: November 24, 2009

AMEND THE FOLLOWING JOB SPECIFICATION(S):

(Draft job specifications attached.)

Item#	DEPT/ DIVISION	Class/Title
1	HRD	1402 Junior Clerk
Item #	DEPT/ DIVISION	Class/Title
2	HRD	1404 Clerk
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Item #	DEPT/ DIVISION	Class/Title
	****	440.40
3	HRD	1406 Senior Clerk
Item#	DEPT/ DIVISION	Class/Title
4	HRD	1408 Principal Clerk
Item #	DEPT/	Class/Title
	DIVISION	CHUSH THE
5	HRD	1410 Chief Clerk

Posting No: 19

Fiscal Year: 2009/2010

Posted Date: November 24, 2009

For additional information regarding the above proposed action, please contact Cathy Abela at (415) 557-4933 oremail her at Cathy.Abela@sfgov.org.

Requests to meet on an item should be addressed to the Human Resources Director, 1 South Van Ness, 4th Floor, San Francisco, CA 94103. All requests must be received in writing no later than close of business seven (7) calendar days from the posting date. FAX'd copies will be accepted as timely with original to follow. Copies of this notice may be obtained from the Information Center, 1 South Van Ness, 4th Floor or from DHR's website at: http://www.sfgov.org/site/sfdhr_page.asp?id=102488

cc: All Employee Organizations

All Departmental Personnel Officers

Anita Sanchez, CSC

Harvey Rose, Budget Analyst

Christina Fong, DHR

Carmela Villasica, DHR

Linda Cosico, DHR

RAS Team Leader(s)

DHR Support Services

Martin Gran, DHR

Steve Ponder, DHR

Cathy Abela, DHR

Karen Taylor, MTA

File

Title: 1402

Job Code: Junior Clerk

INTRODUCTION

Under immediate supervision, performs simple clerical, general office work and related duties as required. Essential functions include: maintaining routine office records; indexing and extracting materials; opening, sorting and distributing incoming mail; processing outgoing mail; delivering materials and supplies to various offices; maintaining routine inventory records; checking accuracy of simple computations; processing copying of large volumes of printed materials; operating simple office machines and equipment; entering information into a computer database; answering phones; providing information; and transferring calls.

DISTINGUISHING FEATURES

This is the junior-level position in the Clerk Series and performs simple clerical tasks under immediate supervision. It is distinguished from the 1404 Clerk in that the latter performs general clerical work of ordinary difficulty.

Supervision Exercised: None

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

- 1. Maintains routine office records by transferring data, calculating totals, compiling summaries, making routine entries and proofreading documents.
- 2. Indexes, inserts and extracts materials from established numerical or alphabetical files; prepares new file folders in accordance with specific instructions.
- 3. Opens, time-stamps and sorts mail.
- 4. Delivers mail, packages, messages, documents, inter-departmental memoranda and other materials and supplies to various offices; delivers mail to post office, registers mail and returns receipt to originating department when requested.
- 5. Maintains simple inventory records of office supplies and equipment; takes inventories as necessary.
- Checks accuracy of simple computations; may receive small amounts of money and issue receipts.
- 7. Processes copying of large volumes of printed material.
- 8. Operates simple office equipment and machinery, such as photocopiers and fax machines; maintains and cleans equipment.
- 9. Enters routine information into computer database.
- 10. May answer phones to obtain or provide routine information to the public, transfer calls, and take messages.
- 11. Performs related duties as required.

Title: 1402

Job Code: Junior Clerk

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: standard alphabetical, numerical, and chronological filing systems.

Ability to: efficiently and accurately file, retrieve, code and index a wide variety of documents; record information in a neat, legible and accurate manner; follow written directions; make simple computations in addition, subtraction, multiplication and division; effectively communicate and understand simple concepts, policies and procedures both to and from departmental representatives and the general public; proficiently read and review a variety of documents and forms for completeness and accuracy; exercise tact and maintain poise in resolving disputes and differences arising with the public and other personnel; use a personal computer in a network environment to enter and update data and create documents.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

- 1. Six (6) months (<u>equivalent to</u> 1000 hours) of verifiable clerical experience <u>including preparing</u> and maintaining a variety of records and/or documents, filing, use of office equipment, <u>public</u> contact and processing of incoming and outgoing mail: OR
- 2. Completion of a clerical training program (240 hours); OR

3.	15 semester ur	nits <u>(or ec</u>	uivalent quarte	<u>er units)</u> of co	ursework from a	n accredited college or
uni	versity,					

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LICENSE AND CERTIFICATION

PROMOTIVE LINES

To: 1404 Clerk

ORIGINATION DATE: January 12, 1961

AMENDED DATE: July 23, 1999, September 29, 2000, November 20, 2009

Page 2 of 3

Title: 1402

Job Code: Junior Clerk

REASON FOR AMENDMENT

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

Deleted: SFMTA **BUSINESS UNIT(S):** COMMN SFCCD SFUSD

Title: Clerk Job Code: 1404

INTRODUCTION

Under general supervision, performs general clerical work of ordinary difficulty and related duties as required. Essential functions include: alphabetical, numerical and/or chronological filing; examining, sorting, indexing, coding and reviewing documents for completeness and accuracy; performing a variety of mathematical computations; operating various types of office equipment; processing and distributing interoffice and U.S. mail; responsibility for explaining and carrying out existing methods and procedures relative to office operations; making routine contacts with other departmental employees and the general public in connection with office operations; and gathering, preparing and maintaining a wide variety of records and reports of some complexity.

DISTINGUISHING FEATURES

This is the journey-level position in the Clerk series. It is distinguished from the 1406 Senior Clerk in that it has no supervisory responsibilities, and incumbents perform work that is less difficult than that performed by incumbents in the 1406 position.

Supervision Exercised: None

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

- 1. Files, maintains and retrieves documents, records and correspondence in accordance with established procedures.
- Codes and indexes documents, records and correspondence. Methods may include color code, terminal digit, numerical, alphabetical and/or chronological order to ensure proper filing and ready access of data.
- 3. Checks and reviews a variety of documents for completeness and accuracy.
- 4. Compiles information and data necessary for the preparation of various departmental reports in which judgment may be exercised in the selection of data and materials.
- 5. Prepares and maintains a variety of reports in which judgment may be exercised in the selection of data and materials.
- 6. Makes mathematical computations using addition, subtraction, multiplication and division of whole numbers, decimals and fractions.
- 7. Receives and accounts for moderate amounts of money from the collection of fees and similar sources.
- 8. Disseminates information and answers inquiries by communicating with the public, departmental personnel and other departments.
- 9. Operates office equipment, including calculators, photocopying equipment, adding machines, computer terminals, microfiche viewers, fax machines and postage meters.
- 10. Processes mail: opens, time stamps, sorts and distributes the incoming mail; stuffs and

Title: Clerk Job Code: 1404

seals envelopes; makes daily pickup and delivery to ensure timely mailing and receipt of mail.

11. Performs related duties as required.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: standard alphabetical, numerical, and chronological filing systems.

Ability to: efficiently and accurately file, retrieve, code and index a wide variety of documents; record information in a neat, legible and accurate manner; follow written directions; make complex computations in addition, subtraction, multiplication and division; effectively communicate and understand complex concepts, policies and procedures both to and from departmental representatives and the general public; proficiently read and review a variety of documents and forms for completeness and accuracy; exercise tact and maintain poise in resolving disputes and differences arising with the public and other personnel; use a personal computer in a network environment to enter and update data, create documents and use system applications, e-mail, spreadsheets, word-processing and organizer software.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

- 1. One (1) year (<u>equivalent to 2000 hours</u>) of verifiable clerical experience <u>including preparing</u> <u>and maintaining a variety of records and/or documents, filing, use of office equipment, public contact <u>and processing of incoming and outgoing mail</u>: OR</u>
- 2. Six (6) months (equivalent to 1000 hours) of verifiable clerical experience as described in #1 and completion of a clerical training program (240 hours); OR
- 3. Six (6) months (equivalent to 1000 hours) of verifiable clerical experience as described in #1 and 15 semester units (or equivalent quarter units) of coursework from an accredited college or university.

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LICENSE AND CERTIFICATION

Title: Clerk Job Code: 1404

PROMOTIVE LINES

To: 1406 Senior Clerk

ORIGINATION DATE: January 12, 1961

AMENDED DATE: September 29, 2000; April 23, 2007, November 20, 2009

REASON FOR AMENDMENTTo accurately reflect the current tasks, knowledge, skills

and abilities defined in the most recent job analysis

conducted for this job code.

BUSINESS UNIT(S): COMMN SFCCD SFMTA SFUSD,

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Title: Senior Clerk Job Code: 1406

INTRODUCTION

Under general supervision, performs difficult, responsible and specialized clerical work, may assign clerical and office work to subordinate office personnel and performs related duties as required. Essential functions include: interpreting, enforcing and carrying out existing methods and procedures relative to office operations; making regular contacts with other departmental personnel and providing information; explaining and interpreting existing laws, regulations and administrative policies to the general public in connection with office activities; gathering, preparing and maintaining a wide variety of records, reports and documents relative to office operations; and calculating basic mathematical computations in connection with the preparation of various reports.

DISTINGUISHING FEATURES

This is the senior-level position in the Clerk series. It is distinguished from the 1404 Clerk in that it has supervisory responsibilities, and incumbents perform work that is more difficult than that performed by incumbents in the 1404 position.

SUPERVISION EXERCISED: May supervise subordinate office personnel.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

- 1. Assigns clerical and office work to subordinate personnel.
- 2. Codes and indexes documents, records and correspondence. Methods may include color code, terminal digit, numerical, alphabetical and/or chronological order to ensure proper filing and ready access of data.
- 3. Disseminates information and answers inquiries by communicating with the public, departmental personnel and other departments.
- 4. Explains and interprets existing laws, regulations and administrative policies governing the activities of the assigned office to the general public and other City personnel.
- 5. Checks and reviews a variety of documents for completeness and accuracy.
- 6. Files, maintains and retrieves documents, records and correspondence in accordance with established procedures.
- 7. Compiles information and data necessary for the preparation of various departmental reports in which judgment may be exercised in the selection of data and materials.
- 8. Prepares and maintains a variety of reports in which judgment may be exercised in the selection of data and materials.
- 9. Makes mathematical computations using addition, subtraction, multiplication and division of whole numbers, decimals and fractions.
- 10. Exercises sound judgment and utilizes knowledge of applicable laws, regulations and

Title: Senior Clerk Job Code: 1406

procedures in solving daily clerical and office problems.

- 11. Receives a variety of telephone and in-person calls and routes such calls and individuals to proper places.
- 12. Receives and accounts for moderate amounts of money from the collection of fees and similar sources.
- 13. Operates office equipment, including calculators, photocopying equipment, adding machines, computer terminals, microfiche viewers, fax machines and postage meters.
- 14. Processes mail: opens, time stamps, sorts and distributes the incoming mail; stuffs and seals envelopes; makes daily pickup and delivery to ensure timely mailing and receipt of mail.
- 15. Performs related duties as required.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: standard alphabetical, numerical, and chronological filing systems.

Ability to: organize and make clerical work assignments; review processed work to assure accuracy, neatness and conformance to departmental regulations and polices; interpret laws, regulations and procedures in recommending solutions to problems; efficiently and accurately file, retrieve, code and index a wide variety of documents; record information in a neat, legible and accurate manner; follow written directions; make complex computations in addition, subtraction, multiplication and division; effectively communicate and understand complex concepts, policies and procedures both to and from departmental representatives and the general public; proficiently read and review a variety of documents and forms for completeness and accuracy; exercise tact and maintain poise in resolving disputes and differences arising with the public and other personnel; use a personal computer in a network environment to enter and update data, create documents and use system applications, e-mail, spreadsheets, word-processing and organizer software.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

- 1. Two (2) years (<u>equivalent to</u> 4000 hours) of verifiable clerical experience included <u>preparing</u> and maintaining a variety of <u>records and/or documents, filing, use of office equipment, public contact and <u>processing of incoming and outgoing mail;</u> OR</u>
- 2. Eighteen (18) months (equivalent to 3000 hours) of verifiable clerical experience as described

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Title: Senior Clerk Job Code: 1406

in #1 and completion of a clerical training program (240 hours); OR

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3. Eighteen (18) months (equivalent to 3000 hours) of verifiable clerical experience as described in #1 and 15 semester units (or equivalent quarter units) of coursework from an accredited

college or university,

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LICENSE AND CERTIFICATION

PROMOTIVE LINES

ORIGINATION DATE: January 12, 1961

AMENDED DATE: September 29, 2000; April 23, 2007, November 20, 2009.

REASON FOR AMENDMENT To accurately reflect the current tasks, knowledge, skills

and abilities defined in the most recent job analysis

conducted for this job code.

COMMN SFCCD SFMTA SFUSD **BUSINESS UNIT(S):**

Title: Principal Clerk Job Code: 1408

INTRODUCTION

Under direction, the 1408 Principal Clerk performs highly responsible, important, and difficult clerical work requiring extensive knowledge of departmental functions, and performs related duties as required. Essential functions of the classification include: supervising, planning, assigning and evaluating subordinate personnel engaged in a wide variety of office clerical work and/or disseminating, explaining and interpreting information requiring specialized knowledge of the policies and procedures of a department; handling confidential correspondence and sensitive and/or personal information; developing staff procedures; resolving day-to-day problems and/or complaints encountered by staff, the public, department representatives, and others; supervising and/or participating in the preparation and maintenance of statistics and records for reports using applicable computer systems; and supervising and/or preparing the processing and handling of administrative documents. May collect, calculate and process applicable charges, fees, taxes, etc. This position requires proficiency in basic computer application programs.

DISTINGUISHING FEATURES

Incumbents in this class serve as supervisors in the clerical series, overseeing the work of clerks and clerk-typists and are responsible for performing highly responsible and difficult clerical work involving extensive knowledge of departmental functions, including serving as a department's primary public contact person to explain important and specialized policies, procedures, and regulations. Positions in this class are distinguished from those of the 1410 Chief Clerk in that the latter supervises a larger unit of clerical staff, performs more independently and/or provides specialized information that is more complex in nature.

SUPERVISION EXERCISED: Supervise employees involved in clerical work.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

- 1. Supervises, plans, assigns and evaluates subordinate personnel to ensure conformance with departmental regulations and policies, existing office procedures, and applicable laws and regulations. This includes maintaining personnel action requests, personnel files and other personnel records. Disseminates, explains and interprets important information requiring specialized knowledge of the policies and procedures of a department, as well as the regulations enforced by the department to the public and/or employees, contractors, vendors, etc.
- 2. Performs highly responsible, important and difficult clerical work involving the exercise of individual judgment by knowing the applicable departmental procedures to which assigned.

Title: Principal Clerk Job Code: 1408

- 3. Reviews and resolves day-to-day transactions, problems and/or complaints encountered by co-workers and/or affiliated parties (members of the public, volunteers, students, city departments and other government agencies, etc).
- 4. Supervises and/or participates in the preparation and maintenance of a wide variety of records and reports by preparing, compiling, and maintaining statistics and records for these reports using applicable computer systems.
- 5. Supervises and/or prepares the processing and general handling of administrative documents such as licenses, permits, purchase orders, work orders, requisitions, contracts, etc. This includes verifying the timeliness and accuracy of these documents.
- 6. May collect, calculate and process applicable charges, fees and taxes, etc.
- 7. Performs related duties and responsibilities as assigned

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: Clerical and office methods, practices and procedures

Ability to: Plan, direct, monitor, and evaluate the work of staff, delegate responsibility, and provide training; prepare annual performance appraisal reports and handling disciplinary cases; identify problems, recommend possible solutions and implement the appropriate solution in accordance to applicable laws, rules, regulations and departmental policies and procedures; prioritize and accurately handle detailed and difficult clerical work; interact effectively and courteously with the public and City employees in all situations especially those requiring sound judgment and professional demeanor; communicate effectively and courteously with the public, staff, and departmental personnel; express ideas clearly, concisely and accurately when writing correspondence and reports; access and use relevant computer software applications and database systems to process records, documents and applicable fees and prepare correspondence and reports.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

Three (3) years <u>(equivalent to 6,000 hours)</u> of <u>verifiable</u> highly responsible and <u>diversified</u>, _ _ clerical experience including preparing and processing complex detailed work impacting an entire department or section; <u>responding to and</u> resolving difficult day-to-day problems and/or complaints encountered by staff, the public, other individuals, etc.on office <u>operations</u> and

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Title: Principal Clerk Job Code: 1408

procedures; and explaining and interpreting complicated information to departments, staff, the public and/or others.

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LICENSE AND CERTIFICATION

PROMOTIVE LINES

To: 1410 Chief Clerk

ORIGINATION DATE: 1/12/61

AMENDED DATE: 9/05/03; 01/12/07, 3/18/2008, 8/19/09, 11/20/09

REASON FOR AMENDMENTTo accurately reflect the current tasks, knowledge, skills

and abilities defined in the most recent job analysis

conducted for this job code.

BUSINESS UNIT(S): COMMN, SFMTA, SFUSD, SFCCD

Title: Chief Clerk Job Code: 1410

INTRODUCTION

Under general direction, the incumbent supervises a large group of employees engaged in a wide variety of office clerical work, and performs responsible and highly specialized clerical and administrative work in connection therewith; or interprets and oversees the dissemination of important information requiring extensive specialized knowledge of the policies and procedures of a department, as well as the regulations enforced by that department, to the public and departmental personnel; and performs related duties as required.

DISTINGUISHING FEATURES

Incumbents in this class either serve as the highest supervisory level in the clerical series, overseeing the work of a large group of clerks and clerk-typists; or, at the specialist level, serve as a lead worker to a group of employees responsible for explaining important and specialized policies, procedures, and regulations of a department to the public. This classification requires considerable responsibility for interpreting, coordinating and enforcing existing methods and procedures applicable to office operations; for assisting in developing new methods and techniques effecting such operations; for initiating and maintaining regular responsible contacts with other city departments, the general public and outside organizations relative to office operations; and requires overall supervisory responsibility for the preparation, maintenance and processing of important and detailed records and reports. Positions in this class are distinguished from those in the Principal Clerk level in that the latter supervises a smaller unit of clerical staff, performs less independently and/or provides specialized information that is less complex in nature.

Supervision Exercised: May supervise a large group of employees engaged in clerical work; or act as lead worker to a group of employees providing specialized information to the public.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

- 1. Plans, assigns, supervises and inspects the clerical and office work of subordinate employees; reviews such work for completeness and conformance to existing procedures and instructions.
- 2. Performs difficult and specialized clerical work involving the exercise of considerable individual judgment and knowledge of appropriate laws, regulations and procedures of the department assigned.
- 3. Interprets, oversees and provides the dissemination of specialized information to the public and/or departmental personnel regarding the policies and procedures of the department to which assigned, as well as the regulations enforced by that department.
- 4. Interviews members of the public in order to obtain information and screens issues to determine appropriate referrals to professional and technical staff; responds to difficult client issues and deals personally with a wide range of problems requiring specialized knowledge

Title: Chief Clerk Job Code: 1410

of the policies, procedures and regulations of a department.

- 5. Accesses specialized computer software in order to obtain and ensure the accuracy of information regarding specific departmental functions.
- 6. Explains and interprets administrative decisions and policies as they apply to office operations of the department.
- 7. Consults with and advises the general public, other departmental officials and other in regards to specific functions and responsibilities of assigned office.
- 8. Supervises the receipt, processing, filing and general handling of a wide variety of documents and papers.
- 9. Participates in the development of new procedures and methods relative to office routines and clerical processes.
- 10. Assists in the preparation of budget estimates and reports.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: modern clerical and office methods, procedures and techniques; departmental organization and methods; applicable laws, rules and regulations pertaining to the activities of the department to which assigned Ability to: plan, organize, supervise and inspect the work of subordinate personnel; exercise good judgment in resolving disputes and differences arising with the general public and other personnel; communicate effectively in writing and orally, including eliciting information necessary for performance of assigned duties; prioritize competing requests for service; establish and maintain effective working relationships with staff, departmental representatives and the public; interpret, apply and explain policies, procedures and regulations specific to departmental functions; prioritize competing requests for service; deal effectively and courteously with the public and other departmental personnel; prepare accurate and concise administrative reports and papers. May require ability to utilize a computer keyboard to access and utilize specialized software.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

Four (4) years (equivalent to 8,000 hours) of verifiable highly responsible and diversified clerical experience, including preparing and processing complex work impacting an entire department or section; responding to and resolving difficult day to day problems and/or complaints encountered by staff, the public and others individuals, etc. on office operation and procedures; and explaining and interpreting information to departments, staff, the public and/or others'; including two (2) years of experience in a supervisory capacity over a clerical function/unit, which included

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Title: Chief Clerk Job Code: 1410

evaluating subordinate employees.

LICENSE AND CERTIFICATION

PROMOTIVE LINES

ORIGINATION DATE: 2/23/61

AMENDED DATE: 3/30/98, 11/20/09

REASON FOR AMENDMENTTo accurately reflect the current tasks, knowledge, skills

and abilities defined in the most recent job analysis

conducted for this job code.

BUSINESS UNIT(S): COMMN, SFMTA,

Deleted: for those positions which will supervise a large group of employees engaged in a wide variety of office clerical work, or, for positions serving as lead worker to a group of employees engaged in disseminating important and specialized departmental information to the public, demonstrated knowledge of that department's policies, procedures, and regulations and two years experience providing such information to the public. ¶

Training: completion of high school or equivalent

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