

City and County of San Francisco
Micki Callahan
Human Resources Director



Department of Human Resources
Connecting People with Purpose
www.sfdhr.org

**NOTICE OF FINAL ACTION TAKEN BY THE
HUMAN RESOURCES DIRECTOR**

Date: August 13, 2018

Re: **Notice of Proposed Classification Actions – Final Notice No. 36 FY 17/18 (copy attached).**

Pursuant to completion of discussion with SEIU 1021 regarding this classification action, the classification action contained in the above referenced notice became effective August 13, 2018.

Micki Callahan
Human Resources Director

by: _____

Steve Ponder
Classification and Compensation Director
Human Resources

cc: All Employee Organizations
All Departmental Personnel Officers
DHR – Class and Comp Unit
DHR – Client Services Unit
DHR – Employee Relations Unit
DHR – Recruitment and Assessment Unit
DHR – Client Services Operations
Micki Callahan, DHR
Michael Brown, CSC
Sandra Eng, CSC
Christopher Colandene, SFERS
Theresa Kao, Controller/ Budget Division
E-File

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR**

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

Posting No: 36
Fiscal Year: 2017/2018
Posted Date: 04/10/2018
Reposted Date: 08/03/2018

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Job specification(s) attached.)

Item #	Job Code	Title
1	1402	Junior Clerk
2	1404	Clerk
3	1406	Senior Clerk
4	1408	Principal Clerk
5	1410	Chief Clerk

Protests on an item should be addressed to the Human Resources Director and can be submitted by mail to the City and County of San Francisco, Department of Human Resources, 1 South Van Ness Ave, 4th Floor, San Francisco, CA 94103 or by email to DHR.ClassificationActionPostings@sfgov.org. All protests must be received in writing no later than close of business seven (7) calendar days from the posting date, and must include the posting and item number(s), the basis on which the protest is submitted and identify the affected parties.

For additional information regarding this proposed classification action, please contact Stephen Fu, Management Assistant, at (415) 701-5680 or by email at Stephen.Fu@sfgov.org.

Copies of this notice may be obtained from the Department of Human Resources or from the website at: <http://sfdhr.org/index.aspx?page=109>. Copies of Civil Service Rule 109 may be obtained from the Department of Human Resources, the office of the Civil Service Commission at 25 Van Ness Ave, Suite 720, San Francisco, CA 94102 or from the website at: [Rule 109 Position Classification and Related Rules | Civil Service Commission](#).

cc: All Employee Organizations
All Departmental Personnel Officers
DHR – Class and Comp Unit
DHR – Client Services Unit
DHR – Employee Relations Unit
DHR – Recruitment and Assessment Unit
DHR – Client Services Operations
Micki Callahan, DHR
Michael Brown, CSC
Sandra Eng, CSC
Christopher Colandene, SFERS
Theresa Kao, Controller/ Budget Division
E-File

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Junior Clerk
Job Code: 1402**

DEFINITION

Under immediate supervision, the 1402 Junior Clerk performs basic clerical, general office work. This is the entry-level position in the Clerk Series.

DISTINGUISHING FEATURES

Class 1402 Junior Clerk is distinguished from class 1404 Clerk in that the former performs basic clerical tasks, and the latter performs general clerical work of ordinary difficulty.

SUPERVISION EXERCISED

None

EXAMPLES OF 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. 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 basic inventory records of office supplies and equipment; takes inventories as necessary.
6. Checks accuracy of basic computations; may receive small amounts of money and issue receipts.
7. Processes copying of printed material.
8. Operates basic office equipment and machinery, such as photocopiers and fax machines; maintains and cleans equipment.
9. Enters routine information into computer database.
10. Answers phones to obtain or provide routine information to the public, transfer calls, and take messages.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Junior Clerk
Job Code: 1402**

KNOWLEDGE, SKILLS, AND ABILITIES

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

Ability and Skill 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 basic computations in addition, subtraction, multiplication and division; effectively communicate and understand basic 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 establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Experience:

Six (6) months of clerical experience including preparing and maintaining a variety of records and/or documents, filing, use of office equipment, public contact and processing of incoming and outgoing mail.

License and Certification:

Substitution:

Any one of the following may substitute for the required experience:

Completion of 15 semester units (or equivalent quarter units) of coursework from an accredited college or university; OR

Completion of a clerical training program (240 hours); OR

Completion of an approved City and County of San Francisco Clerical Administrative training program (as designated on the job announcement).

SUPPLEMENTAL INFORMATION

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Junior Clerk
Job Code: 1402**

PROMOTIVE LINES

To: 1404 Clerk

ORIGINATION DATE: 01/12/1961

AMENDED DATE: 07/23/1999; 09/29/00; 12/04/09; 08/13/18

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN SFMTA SFCCD SFUSD

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Clerk
Job Code: 1404**

DEFINITION

Under general supervision, the 1404 Clerk performs general clerical work. . This is the journey-level position in the Clerk series.

DISTINGUISHING FEATURES

Class 1404 Clerk is distinguished from the 1406 Senior Clerk in that the former performs work that is less difficult than the latter.

SUPERVISION EXERCISED

None.

EXAMPLES OF 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. Files, maintains and retrieves documents, records and correspondence in accordance with established procedures.
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. 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, document imaging, fax machines and postage meters.
10. 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.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Clerk
Job Code: 1404**

KNOWLEDGE, SKILLS, AND ABILITIES

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

Ability and Skill 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 establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Experience:

One (1) year of clerical experience including preparing and maintaining a variety of records and/or documents, filing, use of office equipment, public contact and processing of incoming and outgoing mail.

License and Certification:

Substitution:

Any one of the following may substitute for six (6) months of the required experience:

Completion of a clerical training program (240 hours); OR

15 semester units (or equivalent quarter units) of coursework from an accredited college or university; OR

Completion of an approved City and County of San Francisco Clerical Administrative training program (as designated on the job announcement).

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Clerk
Job Code: 1404**

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

To: 1406 Senior Clerk
From: 1402 Junior Clerk

ORIGINATION DATE: 01/12/1961

AMENDED DATE: 09/29/00; 04/23/07; 12/04/09; 08/13/18

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN SFMTA SFCCD SFUSD

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Senior Clerk
Job Code: 1406**

DEFINITION

Under direction, the 1406 Senior Clerk performs difficult, responsible and specialized clerical work and may assign clerical and office work to subordinate office personnel. This is the senior-level position in the Clerk series.

DISTINGUISHING FEATURES

Class 1406 Senior Clerk is distinguished from the 1404 Clerk in that the former performs work that is more difficult than the latter.

SUPERVISION EXERCISED

May lead employees involved in clerical work.

EXAMPLES OF 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. 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 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.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Senior Clerk
Job Code: 1406**

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, document imaging, 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.

KNOWLEDGE, SKILLS, AND ABILITIES

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

Ability and Skill 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 establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Experience:

Two (2) years of clerical experience included preparing and maintaining a variety of records and/or documents, filing, use of office equipment, public contact and processing of incoming and outgoing mail

License and Certification:

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Senior Clerk
Job Code: 1406**

Substitution:

Any one of the following may substitute for six (6) months of the required experience:

Completion of a clerical training program (240 hours); OR

15 semester units (or equivalent quarter units) of coursework from an accredited college or university; OR

Completion of an approved City and County of San Francisco Clerical Administrative training program (as designated on the job announcement).

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

To: 1408 Principal Clerk

From: 1404 Clerk

ORIGINATION DATE: 01/12/1961

AMENDED DATE: 09/29/00; 04/23/07; 12/04/09; 08/13/18

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN SFMTA SFCCD SFUSD

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Principal Clerk
Job Code: 1408**

DEFINITION

Under general direction, the 1408 Principal Clerk performs highly responsible, important, and difficult clerical work requiring extensive knowledge of departmental functions. Serves as a department's primary public contact person to explain important and specialized policies, procedures, and regulations.

DISTINGUISHING FEATURES

Class 1408 Principal Clerk is distinguished from 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

Supervises employees involved in clerical work.

EXAMPLES OF 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.
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.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Principal Clerk
Job Code: 1408**

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: Clerical and office methods, practices and procedures.

Ability and Skill 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 establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Experience:

Three (3) years of highly responsible and diversified clerical experience including preparing and processing complex detailed work impacting an entire department or section; responding to and resolving difficult day-to-day problems and/or complaints encountered by staff, the public, other individuals, etc. on office operations and procedures; and explaining and interpreting complicated information to departments, staff, the public and/or others.

License and Certification:

Substitution:

Any one of the following may substitute for six (6) months of the required experience:

Completion of a clerical training program (240 hours); OR

15 semester units (or equivalent quarter units) of coursework from an accredited college or university; OR

Completion of an approved City and County of San Francisco Clerical Administrative training program (as designated on the job announcement).

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Principal Clerk
Job Code: 1408**

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

To: 1410 Chief Clerk
From: 1406 Senior Clerk

ORIGINATION DATE: 1/12/1961

AMENDED DATE: 09/05/03; 01/12/07; 03/18/08; 08/19/09; 12/04/09,
02/02/16; 08/13/18

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills & abilities,
and minimum qualifications.*

BUSINESS UNIT(S): COMMN SFMTA SFCCD SFUSD

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Chief Clerk
Job Code: 1410**

DEFINITION

Under general direction, the 1410 Chief Clerk supervises employees engaged in a wide variety of office clerical work.

DISTINGUISHING FEATURES

Class 1410 Chief Clerk is distinguished from the 1408 Principal Clerk 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

Supervises a large group of employees engaged in clerical work.

EXAMPLES OF 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. 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 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. Provides consultation in the development of new procedures and methods relative to office

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Chief Clerk
Job Code: 1410**

routines and clerical processes.

KNOWLEDGE, 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 and Skill 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 establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Experience:

Four (4) years of 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 evaluating subordinate employees.

License and Certification:

Substitution:

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Chief Clerk
Job Code: 1410**

Any one of the following may substitute for 6 months of the required clerical experience:

Completion of a clerical training program (240 hours); OR

15 semester units (or equivalent quarter units) of coursework from an accredited college or university; OR

Completion of an approved City and County of San Francisco Clerical Administrative training program (as designated on the job announcement).

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

ORIGINATION DATE: 02/23/1961

AMENDED DATE: 03/30/98; 12/04/09; 02/02/16; 08/13/2018

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN SFMTA SFCCD SFUSD