

**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: 21
Fiscal Year: 2018/2019
Posted Date: 12/04/2018
Reposted Date: N/A

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

Item #	Job Code	Title
1	4230	Estate Investigator

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.

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: Estate Investigator
Job Code: 4230**

DEFINITION

Under general supervision, performs responsible investigative work in connection with the locating, inventory and preservation of assets of estates coming under the jurisdiction of the public administrator; and performs related duties as required. Requires responsibility for carrying out, explaining and enforcing policies and procedures of the public administrator's office relative to estate matters; personal contacts with friends and relatives of the deceased, business and professional people, government officials and the general public; preparing important legal and financial records concerning the collection and disposition of property; handling property and large sums of money.

DISTINGUISHING FEATURES

SUPERVISION EXERCISED

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. Collects keys to premises and safe deposit boxes, personal papers and valuables of deceased persons; Collects pertinent background information from the coroner, hospitals, and institutions; packs and takes into custody personal effects such as clothing or other personal properties; maintains storage rooms and records showing property on hand and final disposition of same; assists in the sale of articles to be liquidated from estates.
2. Assists in all investigations of premises and effects of deceased persons; locates wills, burial instructions, evidence of safe deposit boxes and other valuables and evidence of assets and takes into custody automobiles, trucks and motorcycles and delivers same to public administrator's garage.
3. Investigates complaints regarding real property being held by the public administrator and claims by parties alleging to have left properties in custody with deceased; obtains affidavits from claimants and delivers property to claimants as directed.
4. Makes safe deposit box searches and assists in compiling inventories of contents.

CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES

Title: Estate Investigator
Job Code: 4230

5. Processes and enters all claims against estates.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: Requires knowledge of legal documents, titles to property, both real and personal; office and court procedures; processes involved in the administration of estates ' including real estate practices, banking and other financial procedures.

Ability or Skill to: Requires ability to: deal courteously and effectively with others in handling difficult personal situations; perform investigations; administer the estates of deceased persons; prepare 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:

~~Requires completion of a four year college or university with~~ **Possession of** a baccalaureate degree, with major course work in public administration, business administration, law, economics or accounting **from an accredited college or university.**

Experience:

~~Requires One (1) year of professional business experience involving investigative responsibilities and the processing of legal and financial documents; or an equivalent combination of training and experience.~~ **Probate, Financial/ Fiduciary Services, Social Work, Case Management or investigations related to one of the above areas.**

License and Certification:

Possession of a valid California Driver License

Substitution:

Possession of a master's degree from an accredited college or university in psychology, social work, public administration or business administration may substitute for the required education and experience.

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

To: Assistant Public Administrator **4231 Senior Estate Investigator**

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

**Title: Estate Investigator
Job Code: 4230**

ORIGINATION DATE: 1/12/1961

AMENDED DATE: 12/XX/18

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

BUSINESS UNIT(S): COMMN