

STATE OF WISCONSIN

PERSONNEL COMMISSION

* * * * *

ARLENE FRITCHEN,
 Appellant,
 v.
 Administrator, DIVISION OF
 PERSONNEL,
 Respondent.

Case No. 79-PC-CS-269

* * * * *

DECISION
 AND
 ORDER

NATURE OF CASE

This is an appeal of a reallocation resulting from a Personnel Management survey (statewide clerical) conducted by the Division of Personnel. Appellant argues she should have been reallocated to Account Specialist 1. Hearing was held on February 10, 1982, testimony was taken and evidence was presented. No post-hearing briefs were filed. In accordance with §227.10, Wis. Stats., the Commission makes the following Findings of Fact and Conclusion of Law.

FINDINGS OF FACT

1. The appellant, Arlene C. Fritchen, is employed in a position classified as Fiscal Clerk 3 by the Department of Health and Social Services, Division of Community Services, Southern Wisconsin Center at Union Grove, Wisconsin. She has been an employe of the State of Wisconsin for approximately 30 years.
2. The position held by the appellant was audited during the statewide clerical survey.
3. As a result of the clerical survey, the appellant's position was reallocated from Account Examiner 3 to Fiscal Clerk 3. The appellant filed

a timely appeal from this reallocation decision with the Commission on 9/20/79.

4. At times relevant to this appeal, the duties and responsibilities of the appellant's position are described and set forth in a position description signed by the appellant on 1/2/80 (Respondent's Exhibit E).

5. Reallocation of the appellant's position by the respondent was based primarily upon the Fiscal Clerk Position Standard (Respondent's Exhibit B). The Class Description for a Fiscal Clerk 3 contained therein is:

Fiscal Clerk 3

This is lead and/or advanced work of moderate difficulty in the verifying, recording and processing of financial and related records and data, requiring the application of standardized agency policies and procedures. Positions allocated to this class are responsible for reviewing the most complex and varied forms of vouchers and related documents that typically encompass a wide range of agency, state and federal regulations and policies.

This review normally includes the verification of coding accuracy, legality and propriety of the transactions. Positions may also function as a lead worker guiding the activities of lower level fiscal clerks engaged in collecting, verifying and processing cash and fiscal control documents, or perform all bookkeeping or account processing services for an organization sub-unit having a wide variety of financial transactions and accounts or for a significant segment of functions of a varied and complex bookkeeping, accounting or cash collection operation. Work is performed under general supervision.

6. The class description of the Account Specialist 1 position is:

Account Specialist 1

This is accounting and record keeping work requiring the application of established accounting procedures and bookkeeping principles. Employees in this classification may function in either of the following capacities: 1) in a developmental capacity within a state agency for future progression to higher level positions 2) in a full operating capacity within an agency involving the active maintenance and administration of a variety of ledgers, accounts, accounts receivable, reports, or comparable business office functions.

Those employees functioning in a developmental capacity are assigned a variety of routine accounting activities in order to gain exposure to the agency and its accounting and general financial management procedures. Those who function at the full operating level may guide subordinates in general fund accounting and report development or cost reporting for a specific segment of a large accounting operation, or may perform the full range of bookkeeping and related business management functions in a restricted accounting operation, such as may be found in a small state institution or agency.

In both instances, employees work within procedures established by accountants or business managers and receive ongoing supervision in the form of report and ledger review and the evidence of account discrepancies.

7. Appellant functions as a lead worker who works under general supervision.
8. Appellant is engaged in advanced, difficult work which involves complex and varied forms and vouchers such as purchase requests, expenditure estimates, utility and telephone billings (Appellant's Exhibit 1) and travel reimbursement claims, (App. Exh. 2). Appellant verifies and processes financial and related records and data and prepares various reports. Examples would include Outstanding Encumbrance and Laundry Usage Reports (App. Exhibits 3 & 4). Appellant's work requires a thorough working knowledge of a wide range of regulations and policies including travel requisitioning.

tion (App. Exhibit 2), union contracts, grant requirements, special policy regarding residents of Southern Wisconsin Center.

9. Appellant is responsible for coding, verification of coding accuracy, selection and decision-making regarding appropriate codes using the accounting manual. Appellant also directs other employees in certain aspects of the coding operation. In this key activity of the accounts payable section at Southern Wisconsin Center, the appellant spends at least 50% of her work time.

10. Appellant has frequent contact with staff, vendors and the public relating to regulation, procedures, status of billings, balances, etc.

11. Appellant does not guide subordinates in general fund accounting and report development or cost reporting for a specific segment of the accounting operation, nor does she perform a full range of bookkeeping and accounting functions.

12. Appellant's position is best described by the Fiscal Clerk 3 position standard.

CONCLUSIONS OF LAW

1. This appeal is properly before the Commission pursuant to §230.44(1)(a), Wis. Stats.
2. The appellant has the burden to show by the greater weight of credible evidence that the decision of the Administrator was incorrect.
3. Appellant has failed to meet that burden of proof.
4. Appellant's position was properly reallocated to Fiscal Clerk 3.

OPINION

In this case there appears to be little or no dispute as to the duties performed by the appellant. Rather, the appellant asserts that the complexity, responsibility, amount of lead work, and independence of her position require her classification more properly be at the Account Specialist 1 level. A review of the testimony, evidence and Fiscal Clerk 3 Position Standard leads the Commission to conclude otherwise.

In essence, the Appellant feels she performs work at a skill level beyond the full performance level and in order to accomplish these varied assignments, she must be able to use an assortment of methods and, in fact be very resourceful. The Fiscal Clerk 3 position standard accurately reflects work of this type in its requirement of "advanced work of moderate difficulty" and through the stated definition of these terms in part E of the standard.

The appellant's exhibits further indicated the complexity, variety and range of facts, information, rules, records, accounts, etc., dealt with in the performance of her job. But again, the position standard for the Fiscal Clerk 3 acknowledges this: "... responsible for reviewing the most complex and varied forms of vouchers and related documents that typically encompass a wide range of agency, state and federal regulations and policies" (emphasis supplied).

The appellant functions as a lead worker and as such guides subordinate workers. This is common to the Fiscal Clerk 3 and the Account Specialist 1 Class Descriptions. However, the nature of the work performed by the

subordinates differs. For the most part the employes subordinate to the appellant are engaged in clerical activity primarily related to the coding function and do not perform the broader range of accounting, bookkeeping, reporting activities which are the duties of subordinates to the Account Specialist position. It is the nature and complexity of the work performed by the subordinates, not the volume or accuracy or deadline requirements related to the work which distinguishes Fiscal Clerk 3 lead work from Account Specialist 1 lead work. On this basis, the Commission again finds the Fiscal Clerk 3 standard applicable to the appellant's position.

With regard to the "independence" of the Appellant, it too is referenced in the Position Standard document. The Fiscal Clerk 3 works under "general supervision" and may, as in this case, function also as a lead worker. This combination, of necessity, indicates the Fiscal Clerk 3 would have a fairly high degree of "independence" and be "generally free to develop own work sequences." There is little doubt that the appellant's long service (30 years at SWC) results in her being very capable of working with perhaps the highest degree of independence and that her efficiency and ability to cope with changing accounting systems, rules and regulations regarding residents, contractual provisions covering employes, grant requirements, etc., are likewise paramount. But how well, or how efficiently or how knowledgeably a person performs activities assigned to and within the standards of a given position are not determinative of the necessity to change the classification of that employe's position. The classification system of the State of Wisconsin classifies positions and not people, and the Commission's authority is limited to the rendering of decisions regarding the propriety of actions taken in relation to and within this system.

The Fiscal Clerk 3 standard indicates the position is involved in "verifications of coding accuracy, legality and propriety of the transaction." Given this and the aforementioned variety and complexity of documents worked with, it is to be expected that a Fiscal Clerk 3, situated as the appellant is, would be involved in "public relations" contact with vendors, employees, supervisory and managerial employees and others. The frequency of these contacts and certainly the appellant's ability to handle, solve or resolve the circumstances causing the contacts are, again, in part a result of her experience and ability as discussed above. Nonetheless, this type of work is, from a review of the Fiscal Clerk 3 standard, intrinsic to the appellant's current position.

In each of the various activity elements of the appellant's position discussed, the hearing examiner is persuaded that the appellant performs, at times, work at some level higher than that of Fiscal Clerk 3. However, the clear majority of the duties performed are those contemplated by the Fiscal Clerk 3 position standard, and appellant's position is, therefore, properly classified as Fiscal Clerk 3.

Fritchén v. DP
Case No. 79-PC-CS-269
Page Eight

ORDER

The decision of the Administrator to reallocate appellant's position to Fiscal Clerk 3 is affirmed and this appeal is dismissed.

Dated: April 29, 1982 STATE PERSONNEL COMMISSION


DONALD R. MURPHY, Chairperson

JWP:jmf


JAMES W. PHILLIPS, Commissioner

Parties:

Arlene Fritchén
808 High Street
Union Grove, WI 53182

Charles Grapentine, Administrator
DP
149 E. Wilson Street
Madison, WI 53702