

B-16



STATE OF NEW JERSEY

FINAL ADMINISTRATIVE ACTION
OF THE
CIVIL SERVICE COMMISSION

In the Matter of Anthony Bradley,
Department of the Treasury

CSC Docket No. 2015-3078

Classification Appeal

ISSUED: **DEC 21 2015**

(LDH)

Anthony Bradley appeals the attached decision of the Division of Agency Services (DAS) that the proper classification of his position with the Department of the Treasury is Accountant 2. Bradley seeks an Accountant 1 classification.

The record in the present matter establishes that Bradley is currently serving permanently in the title of Accountant 2. Bradley's position is located in the Division of Pensions and Benefits, Defined Benefits and Deferred Compensation, Department of the Treasury. Bradley pursued the matter of his classification with DAS. He was asked to complete a Position Classification Questionnaire (PCQ) and all documentation supplied by Bradley, including his most recent Performance Assessment Review (PAR), was reviewed. Subsequently, DAS performed a telephone audit of his position which included an interview with his supervisor, Edward Wade. DAS found that the duties and responsibilities of Bradley's position entailed: creating a formal reconciliation of the bi-weekly clearing account of all retirement systems reported through Central Payroll; assisting pension members with inquiries about their account received via phone or email; assigning and reviewing Workers Compensation audits for pension members; analyzing member accounts to ensure proper credit is awarded for pension and service time; processing back pay awards identified on the "Bad Pay" list; and processing correspondence received from other sections, pension members, and employer locations regarding pension and contributory insurance. Though Bradley was responsible for overseeing the work of one Pensions Benefits Specialist Trainee, it was determined

that he was not assigned any supervisory responsibilities. This was confirmed by the appointing authority. In a prior classification appeal for Accountant 1, the Commission denied Bradley's appeal. Based on the foregoing, DAS determined that the duties performed by Bradley were consistent with the definition and examples of work included in the job specification for Accountant 2.

On appeal to the Civil Service Commission (Commission), Bradley argues that his duties and responsibilities are more consistent with the title of Accountant 1. He contends that he is responsible for overseeing the work of an accounting unit comprised of a Pensions Benefits Specialist Trainee, Pensions Benefits Specialist 3 and an Auditor Accountant Trainee.¹ Bradley asserts he is currently responsible for PARs, leave requests, and timesheets through eCATS. According to Bradley, he is responsible for the collection and accounting of employer paid Group Life Insurance and Long Term Disability premiums for the Defined Contribution Retirement Program. Additionally, he argues that he has taken over the duties of an Administrative Analyst 2, Accounting, effective April 1, 2015. In this regard, he asserts that he is responsible for verifying and authorizing the production of checks printed through DOT's miscellaneous check system and for the production of the monthly values for the SACT Tax-Shelter and Regular Defined Contribution Plans. In support, he submits, *inter alia*, Supplemental Annuity Collective Trust Program spreadsheets and a letter from his supervisor Edward Wade. Initially, Wade indicated that Bradley is responsible for the Defined Contribution Retirement Program. In addition, Wade indicated that Bradley supervised a Pensions Benefits Specialist and an Auditor Accounting Trainee. Thus, he argues that the title of Accountant 1 is a more appropriate classification.

CONCLUSION

The definition section of the job specification for Accountant 1 states:

Under the direction of a supervisory officer in a state department, institution, or agency supervises the work of an accounting unit, or, personally is responsible for a complex accounting program; does related work as required.

The definition section of the job specification for Accountant 2 states:

Under the direction of an Accountant 1 or other supervisory officer, takes the lead in (1) a group of Accountants of lower grades engaged in professional accounting work, or (2) independently handles accounting programs; does related work as required.

¹ Bradley submitted proof of supervision of an Auditor Accountant-Trainee but the individual only began working for the appointing authority four days after the audit.

A review of the record reveals that Bradley's position is properly classified by the title of Accountant 2. Incumbents in the title Accountant 1, either regularly act as a team leader of professional accountants performing moderately difficult accounting work *or* are personally responsible for a complex accounting program (emphasis added). Despite Bradley's assertion that he supervises employees, the record reveals that he did not possess any supervisory responsibility at the time of the audit. In this regard, the foundation of position classification, as practiced in New Jersey, is the determination of duties and responsibilities being performed at a given point in time as verified by this agency through an audit or other formal study. Thus, classification reviews are based on a current review of assigned duties and any remedy derived therefrom is prospective in nature since duties which may have been performed in the past cannot be reviewed or verified. Given the evolving nature of duties and assignments, it is simply not possible to accurately review the duties an employee may have performed in the past or subsequent to the audit. This agency's established classification review procedures in this regard have been affirmed following formal Civil Service Commission review and judicial challenges. *See In the Matter of Community Service Aide/Senior Clerk (M6631A), Program Monitor (M62780), and Code Enforcement Officer (M00410)*, Docket No. A-3062-02T2 (App. Div. June 15, 2004).

Moreover, in 2013, Bradley filed a classification appeal with a PCQ that substantially mirrors the PCQ that he now submits. In *In the Matter of Anthony Bradley* (CSC, decided December 5, 2013), the Commission determined that he was not personally responsible for a complex accounting program. Despite Bradley's contention that he now is responsible for a complex accounting program, Bradley is performing substantially the same duties that he performed in 2013. Accordingly, Bradley has failed to establish that DAS's determination, that his position is properly classified as an Accountant 2, was incorrect.

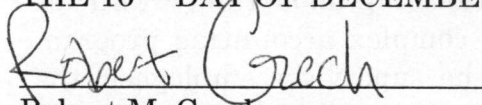
Finally, if Bradley believes that his current duties have changed as a result of his supervision of an Auditor Accountant Trainee, he should file a new classification request based on these new duties.

ORDER

Therefore, the Civil Service Commission concludes that Anthony Bradley is properly classified in the title of Accountant 2.

This is the final administrative determination in this matter. Any further review should be pursued in a judicial forum

DECISION RENDERED BY THE
CIVIL SERVICE COMMISSION ON
THE 16TH DAY OF DECEMBER, 2015



Robert M. Czech
Chairperson
Civil Service Commission

Inquiries
and
Correspondence

Henry Maurer
Director
Division of Appeals and Regulatory Affairs
Civil Service Commission
Written Record Appeals Unit
P.O. Box 312
Trenton, New Jersey 08625-0312

Attachment

- c: Anthony Bradley
- Douglas Ianni
- Kenneth Connolly
- Joseph Gambino



STATE OF NEW JERSEY
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Chris Christie
Governor
Kim Guadagno
Lt. Governor

Robert M. Czech
Chair Chief Executive Officer

April 28, 2015

Mr. Anthony Bradley
[REDACTED]
[REDACTED]

RE: Classification Appeal, Accountant 2
AS LOG# 11140345, Position# 958905, EID# 000348289

Dear Mr. Bradley:

This is to inform you, and the Department of the Treasury of our determination concerning your classification appeal. This determination is based upon a thorough review and analysis of all information and documentation submitted and a telephone audit conducted with you, and your immediate supervisor, Edward Wade, on March 19, 2015.

Issue:

You are appealing that your current title of Accountant 2 (P21) is not consistent with your current assigned duties and responsibilities. You contend that the title of Accountant 1 (R24) is an appropriate title for your position.

Organization:

Your position is located in the Department of the Treasury, Division of Pensions and Benefits, Defined Benefits and Deferred Compensation Plans Reporting and report directly to Edward Wade, Supervising Pensions Benefits Specialist (S27). At the time of the telephone audit, your position was responsible for overseeing the work of one (1) Pensions Benefits Specialist Trainee (P95) position. Your position has not been assigned supervisory responsibility,

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Finding of Fact:

The primary responsibilities of your position include, but are not limited to the following:

- Creating a formal reconciliation of the bi-weekly clearing account of all retirement systems reported through Central Payroll. Each quarter making appropriate accounting adjustments and journal entries in the General Ledger.
- Assisting pension members with inquiries about their account received via phone or email. Responsibilities include account audits, service audits, Workers Compensation audits, and any other questions presented by members regarding their retirement account.
- Assigning and reviewing Workers Compensation audits for pension members. Using the Risk Management system, analyzing member accounts to ensure proper credit is awarded for pension and service time.
- Processing back pay awards identified on the "Bad Pay" list. Payments are made on supplemental periods to members out on Sick Injury Leave or for disciplinary reasons.
- Processing correspondence received from other sections, pension members, and employer locations regarding pension and contributory insurance.

Review and Analysis:

In reviewing your request, various titles were examined in relation to the overall duties being performed by your position to determine the appropriate classification for the tasks described by you and your supervisor.

Your position is currently classified by the title, Accountant 2 (50453-P21). The definition section of the job specification for this title states:

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“Under the direction of an Accountant 1 or other supervisory officer, takes the lead in (1) a group of Accountants of lower grades engaged in professional accounting work, or (2) independently handles accounting programs; does related work as required.”

An Accountant 2 acts as a lead worker by advising and assisting other Accountants of lower grades within the unit or independently handles accounting programs.

Your classification appeal submission indicates that you believe the title Accountant 1 (50454-R24) is an appropriate title for your position. The definition section for this title states:

“Under the direction of a supervisory officer in a state department, institution, or agency supervises the work of an accounting unit, or, personally is responsible for a complex accounting program; does related work as required.”

An Accountant 1 either (1) supervises the work of an accounting unit or (2) is personally responsible for a complex accounting program. Your position does not supervise the work of an accounting unit. Additionally, the responsibility for a complex accounting program has not been demonstrated. Your position independently prepares financial and work related reports containing findings and recommendations in the handling of accounting programs.

A comprehensive review of your position's assigned duties and responsibilities finds that the main function of your position is to independently prepare formal reconciliation of the Bi-Weekly Clearing accounts for retirement systems that report contributions through the Office of Management and Budget's Centralized Payroll Systems. Additionally your position is responsible for responding to correspondence requests; reviewing assigned Workers' Compensation claims and benefits for Bi-Weekly employees; processing back pay awards; and performing other related duties to assure that contributions, service, and salary reported by employers are accurately credited to members of the Defined Benefit Retirement System. Further, this position is responsible for independently performing accounting work to ensure that contributions, service, and salary reported by employers are credited to members.

Mr. Anthony Bradley

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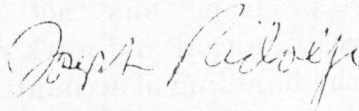
The preponderance of assigned duties and responsibilities of your position are significantly descriptive of tasks assigned to the title, Accountant 2.

Determination:

Based upon the findings of fact above, it is my determination that the assigned duties and responsibilities of your position are properly classified by the title Accountant 2 (50453-P21).

Please be advised that in accordance with *N.J.A.C. 4A:3-3.9*, you may appeal this decision within twenty (20) days of receipt of this letter. This appeal should be addressed to Written Records Appeals Unit, Division of Appeals and Regulatory Affairs, P.O. Box 312, Trenton, New Jersey 08625-0312. Please note that the submission of an appeal must include a copy of the determination being appealed as well as written documentation and/or argument substantiating the portions of the determination being disputed and the basis for the appeal.

Sincerely,



Joseph Ridolfi, Team Leader
Agency Services

JR/tc

c: Ms. Joanne Pascucci, Treasury Human Resources