B-19

STATE OF NEW JERSEY

In the Matter of Donna Moratelli,
Vineland School District

CSC Docket No. 2015-3232

FINAL ADMINISTRATIVE ACTION OF THE CIVIL SERVICE COMMISSION

Classification Appeal

ISSUED: DEC 21 2015 (LDH)

Donna Moratelli appeals the attached decision of the Division of Agency Services (DAS) that the proper classification of her position with Vineland School District is Keyboarding Clerk 2. Moratelli seeks a Keyboarding Clerk 3 classification.

The record in the present matter establishes that Moratelli is currently serving permanently in the title of Keyboarding Clerk 2. Moratelli's position is located at the Vineland High School South Campus. Moratelli pursued the matter of her classification with DAS. She was asked to complete a Position Classification Questionnaire (PCQ) and all documentation supplied by her, including her most recent performance evaluation (PAR), was reviewed. DAS found that the duties and responsibilities of Moratelli's position entailed updating the school information system; utilizing software applications to prepare student transcripts; maintaining files of requests for transcript, release forms; assisting Home Instruction Team by sending an approval or denial letter out; requesting a new doctor's note prior to the expiration date of previous one; updating information in spreadsheet; assisting in organizing Merit Assembly; arranging catering; ensuring maintenance of facilities for use during event; scheduling college visits and appointments for students; preparing and providing passes for students; scheduling calendar for conference room; preparing letter and other correspondence; inventory office supplies; sorting and distributing mail; preparing and maintaining folder and files; and file, photocopy, fax, and scan documents as required. Moratelli does not have any

supervisory responsibilities. Based on the foregoing, DAS determined that the duties performed by Moratelli were consistent with the definition and examples of work included in the job specification for Keyboarding Clerk 2.

On appeal to the Civil Service Commission (Commission), Moratelli argues that her duties and responsibilities are more consistent with a Keyboarding Clerk 3 classification. She states that 40% to 50% of her work day is spent processing transcript requests from current and former students which requires her to utilize multiple computer systems. She contends that she uses computer based programs to create Word documents for students, parents and organizations; and that she is the sole person responsible for the creation and maintenance of a spreadsheet that monitors the activities of the Home Instruction students. Moratelli states that she is responsible for supervising the occasional temporary clerical staff members as there are no other permanent clerical staff members within her department. Lastly, Moratelli asserts she utilizes keyboard equipment in her office and that her workload has increased over the past three years. In support, she submits recommendation letters from the Supervising Secretary and from three Guidance Counselors.

CONCLUSION

The definition section of the job specification for Keyboarding Clerk 2 states:

> Under limited supervision, performs moderately complex and non-routine clerical work involving the processing of documents in a variety of functions; performs moderately complex and non-routine clerical work requiring the utilization of keyboarding or typing skills; formats, reproduces, corrects, adjusts and prints a variety of written material; key enters/types correspondence, documents, reports, charts and other materials on a computer console, typewriter, or other key entry device used by the agency; may provide guidance and assistance to staff; does other related duties as required.

The definition section of the job specification for Keyboarding Clerk 3 states:

> Under direction, performs varied, complex clerical work involving the processing of documents in a variety of functions; takes the lead and/or performs the more difficult and complex clerical work requiring the utilization of keyboarding or typing skills and the application of independent judgment; formats and key enters/types correspondence, documents, reports, charts and other materials on a computer console, typewriter, or other key entry device used by the agency; takes the lead over the clerical employees; does other related duties as required.

A review of the record reveals that Moratelli's position is properly classified by the title of Keyboarding Clerk 2. In this regard, incumbents in the title of Keyboarding Clerk 2 would operate a computer console, typewriter, or other key entry device to key, enter, or type a variety of documents; key enter or type address on envelopes and information on forms, form letter, or other form-like documents; and key enter or type technical, statistical, and other statements, reports, correspondence, charts, forms, bills, all from copy, records, or tapes.

An incumbent in the title, Keyboarding Clerk 3, would perform the same duties as an incumbent in the title, Keyboarding Clerk 2. The major difference between Keyboarding Clerk 2 and Keyboarding Clerk 3 is the performance of lead worker duties in the latter. Specifically, an individual in the title of Keyboarding Clerk 3 would also train other employees in the operation of equipment and/or software used by the agency, apply independent judgment in resolving problems, and interpret and apply organizational rules, regulations, policies, and procedures. Taking the lead is not considered a supervisory responsibility. An incumbent in a leadership role refers to persons whose titles are non-supervisory in nature, but are required to act as a leader of a group of employees in titles at the same or lower level than themselves and perform the same kind of work as that performed by the group being led. *See In the Matter of Catherine Santangelo* (Commissioner of Personnel, decided December 5, 2005). A lead worker may have responsibility for directing the activities of permanent and/or temporary employees. *See In the Matter of Virginia Stemler* (CSC, decided June 4, 2014) (Since appellant would be responsible for leading any subsequent temporary or permanent employees filling a position in her unit, appropriate to classify her position with a lead worker title even though she oversees temporary employees who may leave at the conclusion of their temporary employment period). Here, Moratelli states on her appeal that she occasionally performs lead worker duties. However, lead worker duties were not indicated anywhere on her PCQ nor was it confirmed by DAS in an audit of her primary duties. Accordingly, Moratelli has failed to establish that DAS's determination, that her position properly classified as Keyboarding Clerk 2, was incorrect.

ORDER

Therefore, the Civil Service Commission concludes that Donna Moratelli is properly classified in the title of Keyboarding Clerk 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 Czech

Robert M. Czech
Chairperson
Civil Service Commission

Inquiries
and
Correspondence

Henry Maurer
Director
Division of Appeals and Regulatory Affairs
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P.O. Box 312
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Attachment

c: Donna Moratelli
Dr. Joseph Rossi
Kenneth Connolly
Joseph Gambino

Chris Christie
Governor
Kim Guadagno
Lt. Governor

STATE OF NEW JERSEY
CIVIL SERVICE COMMISSION
AGENCY SERVICES
P.O. Box 313
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Robert M. Czech
Chair/Chief Executive Officer

May 18, 2015

Donna Moratelli
[redacted]

Re: Classification Appeal – Keyboarding Clerk 2, EID # 000072118, Log # 11140128

This is to inform you of our determination in the classification appeal of your position. This determination has been established based upon a thorough review and analysis of all the information submitted by you including the Position Classification Questionnaire (DPF-44) signed by you, your supervisor and the Appointing Authority.

Issue:
You hold permanent status in the title, Keyboarding Clerk 2, and contend you are performing duties consistent with the title, Keyboarding Clerk 3.

Organization:
Your position is located within Vineland High School South Campus. Your immediate supervisor is Dorothy Bertoldi, Secretarial Assistant. You do not have any supervisory responsibilities.

Findings of Fact:
You work within the Guidance Department and perform the following assigned duties and responsibilities:

- Update the school information system and utilize required software applications to prepare student transcripts. Maintain files of requests for transcripts, release forms, and sent transcripts. Mail out transcripts. Answer questions and provide information to students and parents.

- Assist Home Instruction Team by sending an approval or denial letter out. Request a new doctor's note prior to the expiration date of previous one. Update information in spreadsheet.

- Assist in organizing Merit Assembly. Arrange catering. Ensure maintenance of facilities for use during event. Make calls to parents. Provide information to students and donors. Collect and mail applications. Track and maintain records associated with Merit Assembly.

- Schedule college visits and appointments for students. Prepare and provide passes for students. Prepare scheduling calendar for conference room. Post information on bulletin board. Provide and update monthly scholarship bulletins. Prepare information calendar for tests and provide assistance in registering students for tests.

- Prepare letters and other correspondence. Inventory office supplies. Sort and distribute mail. Answer calls. Schedule appointments. Provide office coverage for other units. Transcribe letters for Principal as necessary.

- Prepare and maintain folders and files. File, photocopy, fax, and scan documents as required.

Review and Analysis:

The definition section of the job specification for the title, Keyboarding Clerk 2 states:

> "Under limited supervision, performs moderately complex and non-routine clerical work involving the processing of documents in a variety of functions; performs moderately complex and non-routine clerical work requiring the utilization of keyboarding or typing skills; formats, reproduces, corrects, adjusts and prints a variety of written material; key enters/types correspondence, documents, reports, charts and other materials on a computer console, typewriter, or other key entry device used by the agency; may provide guidance and assistance to staff; does other related duties as required."

The definition section of the job specification for the title, Keyboarding Clerk 3 states:

> "Under direction, performs varied, complex clerical work involving the processing of documents in a variety of functions; takes the lead and/or performs the more difficult and complex clerical work requiring the utilization of keyboarding or typing skills and the application of independent judgment; formats and key enters/types correspondence, documents, reports, charts and other materials on a computer console, typewriter, or other key entry device used by the agency; takes the lead over other clerical employees; does other related duties as required."

Typical duties and responsibilities of an incumbent in the title, Keyboarding Clerk 2, are moderately complex and include key entering or typing a variety of documents, providing corrections and adjustments in prepared text, updating material and files, composing replies to routine correspondence, reviewing reports, documents and applications for completeness and corrections; referring problems to a supervisor for resolution, and providing guidance and assistance to staff.

An incumbent in the title, Keyboarding Clerk 3, would perform the same duties as an incumbent in the title, Keyboarding Clerk 2, as well as take the lead over other clerical staff, train other employees in the operation of equipment and/or software used by agency, apply independent judgment in resolving problems, and may interpret and apply organizational rules, regulations, policies, and procedures.

Determination:

Based on these findings, it has been determined that the current duties and responsibilities of your position are commensurate with your permanent title, Keyboarding Clerk 2. This position is appropriately classified.

An appeal of this decision may be filed within twenty days of receipt of this letter. Since an appeal will be subject to final administrative review, all arguments that you wish considered should be submitted within the specified timeframe. Please include a copy of this letter. Appeals should be addressed to the Written Records Appeal Unit, Division of Appeals and Regulatory Affairs, Civil Service Commission, P.O. Box 312, Trenton, New Jersey 08625-0312.

Sincerely,

Cheryl Legg

Cheryl Legg
Human Resource Consultant 5
Division of Agency Services

CL/zw
C: Dr. Joseph Rossi