



STATE OF WASHINGTON
OFFICE OF FINANCIAL MANAGEMENT
STATE HUMAN RESOURCES | DIRECTOR'S REVIEW PROGRAM
P.O. Box 40911 · Olympia, WA 98504-0911 · (360) 407-4101 · FAX (360) 586-4694

June 20, 2014

TO: Teresa Parsons, SPHR
Director's Review Program Supervisor

FROM: Kris Brophy, SPHR
Director's Review Investigator

SUBJECT: Jennifer Tegner v. Department of Social and Health Services (DSHS)
Allocation Review Request ALLO-13-066

Director's Determination

This position review was based on the work performed for the six-month period prior to July 11, 2013, the date the DSHS Classification and Compensation Unit (CCU) received Ms. Tegner's request for a position review. As the Director's Review Investigator, I carefully considered all of the documentation in the file, the exhibits, and the verbal comments provided by both parties during the review conference. Based on my review and analysis of Ms. Tegner's assigned duties and responsibilities, I conclude her position should be reallocated to the Secretary Senior classification.

Background

On July 11, 2013 the DSHS CCU received Ms. Tegner's Position Review Request (PRR) form asking that her position be reallocated to the Administrative Assistant 3 classification.

On July 26, 2013 DSHS CCU notified Ms. Tegner that her position was properly allocated to the Office Assistant 3 class (Exhibit B-1).

On August 23, 2013, the State HR Director's Program received Ms. Tegner's request for a Director's review of DSHS's allocation determination (Exhibit A-1).

On May 13, 2014, I conducted a Director's review conference with the parties. Present during the call were Jennifer Tegner; Bettina Suttle, Shop Steward, WFSE; Todd Dubble, Assistant Director Residential and Medical Services, DSHS, C.J. Iwata, Classification & Compensation Specialist, DSHS CCU.

Rationale for Director's Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Duties and Responsibilities

Ms. Tegner works at the Special Commitment Center (SCC) facility on McNeil Island. Her position provides daily office administration, clerical and secretarial support to Program Area 3 unit staff. This unit consists of supervisory and line RRC staff employees who provide RCC services for residents residing in two housing units within the SCC facility.

Ms. Tegner reported to Mr. Byron Eagle, Residential Rehabilitation Counselor 4 (RRC 4) who is the unit's Program Area 3 Manager (PAM), for the first two months of the review period. In March 2013, Mr. Eagle was promoted within the facility and the PAM position was left vacant. For the remainder of the review period, Ms. Tegner reported to the Assistant Director of Residential and Medical, Mr. Todd Dubble.

Ms. Tegner's position performs a variety of daily office administration and related clerical support tasks for the Program Area 3 management and staff. Ms. Tegner stated during the review telephone conference that she has primary responsibility for providing a variety of administrative office support services for the unit's daily operations.

Ms. Tegner's duties and responsibilities are summarized from the PRR (Exhibit B-5) as follows:

- 20% Timekeeping for unit staff
Keep track of absences and overtime, maintain spreadsheets, check various reports and cross check them for accuracy of staff absences, collect all paperwork, track unauthorized absences and report to PAM trends.
- 22% Treatment team
Communicate with all attendees and prepare agenda, schedule resident's attendance to meeting, take minutes in meeting and process all paperwork.
- 13% Resident Paperwork
Collect and process RTF's for Albertson's/Up in Smoke, update Alberston's/Up in Smoke spreadsheets for the entire facility of residents current level, exception meeting requests (including attending exceptions meetings bi-weekly), hot trash forms, waivers, meal sharing requests, indigent forms, meals on unit forms, recreation center forms, replying to all resident correspondence on PAM's behalf.
- 7% Placement meeting
Take minutes in facility meeting, send out to various people throughout facility, manage history of movement and unit schematics, process associated

paperwork, update caseload, Albertson's/Up in Smoke spreadsheets of resident living locations.

5% Hiring Process

PPT's, initial employment paperwork, coordinating transfers of employees with other departments.

5% Training

Train new assistants for the other 2 program areas in policy and procedure.

5% Community Meetings

Post flyer for residents to give agenda item requests, Prepare agenda, take minutes in meeting, follow up with residents concerns both in house and with other departments in the facility.

5% Maintenance Requests

Receive maintenance requests from staff and residents, input into maintenance system and track progress, maintain spreadsheet of previous requests.

5% Record Management

Maintain records for resident paperwork, update BMR database for unit, sending paperwork to records and record destruction for items kept on the unit.

8% Other

Maintain fire drill records for staff, order unit supplies, notary responsibilities, clerical backup duties for other departments and administrative support.

Supervisor Comments

Ms. Tegner's supervisor, Mr. Todd Dubble, completed the Supervisor's section of the PRR. Mr. Dubble indicates in the PRR that Ms. Tegner's description of her assigned duties and responsibilities is not accurate and complete. In his comments Mr. Dubble indicates that Ms. Tegner's immediate supervisor is the PAM position. He also states that Ms. Tegner does not have responsibility for representing the unit in the absence of the PAM at various meetings, although she will take notes and forward the communication to and from the manager. He also states that when unit employees contact Ms. Tegner with questions for the manager, she will take messages and forward the communication to and from the manager; however she does not answer in place of the manager.

Summary of Ms. Tegner's Perspective

Ms. Tegner asserts her position meets the Administrative Assistant 3 class by providing varied higher-level administrative support duties for her supervisor. This includes taking minutes at various meetings, maintaining records for the unit, and completing all necessary paperwork for the residents that reside in the unit.

Ms. Tegner states that she has assisted in establishing procedures that affect not only her unit but all three program areas in the facility. She states that she has also assisted the PAM and supervisors with devising unit standards and procedures.

Ms. Tegner asserts she also provides direct secretarial support to the PAM. Ms. Tegner stated during the review telephone conference that she serves as a liaison between her supervisor and unit supervisors relaying assignments so that he and staff are prepared for the unit's regularly scheduled meetings. Ms. Tegner asserts she also provides secretarial support to supervisors to assist them with clerical work with respect to the unit's office operations. Ms. Tegner asserts she represents her supervisors' and unit's goals and interests and provides explanations to staff of her supervisor's viewpoints regarding unit and related work activities.

In total, Ms. Tegner asserts her responsibilities, including serving as a liaison to staff and performing various administrative functions for Program Area 3 fall accurately within the Administrative Assistant 3 class.

Summary of DSHS's Reasoning

Ms. Iwata asserts in her determination that the scope of Ms. Tegner's position does not meet the allocating criteria for allocation to a class within the Administrative Assistant series. She asserts the majority of Ms. Tegner's work does not fit any of the definitions or distinguishing characteristics of any of the classes within the Administrative Assistant series.

For example, Ms. Iwata asserts Ms. Tegner does not provide para-professional administrative and staff assistance to a professional supervisor by reviewing, controlling, prioritizing, and coordinating the work of the supervisor's professional staff as required at the Administrative Assistant 1 class level. Ms. Iwata states in the determination that Mr. Dubble has not formally delegated this level of responsibility to Ms. Tegner.

Further, Ms. Iwata asserts Ms. Tegner's position does not provide administrative staff support services for a section or unit with delegated authority to act in her supervisor's behalf in areas of substance as required at the Administrative Assistant 2 level. Ms. Iwata asserts Ms. Tegner did not have authority to act on behalf of her immediate supervisor, Mr. Eagle, who vacated the position during the review period, or on behalf of Mr. Dubble, Assistant Director of Residential & Medical, who then served as her supervisor for the majority of the review period.

Ms. Iwata also asserts Ms. Tegner does not supervise professional or clerical subordinates and does not have a formal reporting alignment identifying her position as the principal administrative assistant to her supervisor as required at the Administrative Assistant 2 level.

Ms. Iwata asserts that Ms. Tegner's position does not meet the Distinguishing Characteristics of the Administrative Assistant 3 class of performing higher level administrative duties of a substantive nature that are appropriately performed by her supervisor. She also contends that Ms. Tegner does not have delegated responsibility to perform one or more major program activities that are a major element of her supervisor's job.

In the determination, Ms. Iwata states that Ms. Tegner did not spend a majority of her time performing secretarial duties and therefore her position was properly allocated to the Office Assistant 3 class. However, in her closing comments during the review conference Ms. Iwata revised her position and stated that based on the discussion and information provided during the conference she felt the scope of Ms. Tegner's position more appropriately aligned with the Secretarial series. She indicated that on a best fit basis Ms. Tegner's position should be reallocated to the Secretary class.

Comparison of Duties to Class Specifications

When comparing the assignment of work and level of responsibility to the available class specifications, the class series concept (if one exists) followed by definition and distinguishing characteristics are primary considerations. While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification.

Comparison of Duties to Administrative Assistant 3

The Definition of the Administrative Assistant 3 classification states:

Positions perform varied administrative and secretarial support duties or positions are responsible for one or more major program activities under a second line supervisor.

The Distinguishing Characteristics for this class state:

Positions are delegated higher-level administrative support duties or positions are delegated one or more major program activities that would be performed under a second-level professional supervisor, manager or administrator in WMS Band II or above or in exempt service, chief administrator, or head of a major organizational unit such as a school, college, or major academic or administrative department. Only one position will be allocated to an individual second-line supervisor for those positions performing one or more major program activities.

A major program activity is defined as a function that is a major element of the supervisor's job. The duty must stand alone and would create significant adverse consequences if poorly performed. However, full delegation can't occur if the supervisor's position requires specialized licensure such as attorneys, medical doctors, and engineers.

Higher-level administrative duties are duties of a substantive nature that are appropriate to be performed by the supervisor, manager, administrator, or professional level employee but have been delegated to the administrative assistant to perform. Areas may include but are not limited to, the following: budget development and/or management, expenditure control, office space management, equipment purchases, budget development and/or management, public relations, personnel administration, records management, and report preparation.

Incumbents in these positions represent the supervisor's and/or unit's goals and interests and provide interpretation or explanation of the supervisor's policies or viewpoints.

The scope of Ms. Tegner's position does not reach responsibility for providing administrative and secretarial support duties at the level required by the Definition and Distinguishing Characteristics of this class.

First, Ms. Tegner's position does not provide higher-level administrative support services to her supervisor. Higher level administrative duties are duties of a substantive nature that are

appropriately performed by her supervisor, but have been delegated to the Administrative Assistant to perform. According to Mr. Dubble, this level of responsibility has not been delegated to Ms. Tegner's position.

In addition, Ms. Tegner's position does not have responsibility for providing assistance for one or more major program activities for her supervisor as required. Major program activities consist of performing functions that are a major element of the supervisor's job. This level of delegation has not been assigned to Ms. Tegner's position at either her immediate supervisor's or the Assistant Director's level.

While Ms. Tegner's position includes performing certain daily administrative tasks associated with the unit's daily operations, her position does not have delegated authority to act on her supervisor's behalf in substantive areas at the level envisioned by this class. Her position does not have a reporting alignment identifying her position as the administrative assistant to her supervisor, who is the second-line supervisor for Program Area 3. The scope of Ms. Tegner's position does not include responsibility for representing her supervisor's and/or the unit's goals and interests and providing interpretation or explanation of her supervisor's policies or viewpoints to lower level supervisors or staff commensurate with the level of authority anticipated by this class.

For example, Ms. Tegner states in the PRR that she provides varied administrative and secretarial support to her supervisor and the RRC supervisors in the unit regarding unit office administration and related matters. However, Mr. Dubble stated during the review conference that his position has an Administrative Assistant position reporting to him and that Ms. Tegner's position does not have delegated and primary responsibility for providing administrative support to his position for higher-level program functions, or to the PAM-level position Ms. Tegner reports to normally. He also stated that his need for administrative assistance is minimal, that budget administration is not performed at the Program Area 3 level, and that Ms. Tegner does not have authority to act on his behalf in his absence.

It is acknowledged that a portion of her work does include performing various daily administrative and office support tasks for the department such as interpreting and applying administrative policies and procedures in support of the work performed within the unit. She also uses the agency's TRACKS system to purchase equipment and supplies for the unit.

Additionally, while it is also acknowledged that Ms. Tegner at times writes staff procedures according to the PAM's directives for the unit, this is not considered a delegation of authority to act in place of her supervisor, the PAM, or Mr. Dubble in substantive areas on a regular and ongoing basis as required.

Further, although Ms. Tegner has participated in some hiring activities, she does not have administrative responsibility regarding unit personnel issues. The unit's supervisors are responsible for managing staffing and performing other personnel-related activities for their staff and any involvement with Ms. Tegner regarding staffing issues is informational or procedural rather than managerial. Ms. Tegner's position does not have any budget-related responsibility.

In total, Ms. Tegner's position does not meet the primary allocating criteria for allocation to the Administrative Assistant 3 class or other classes within the Administrative Assistant series. Ms. Tegner's position has not been delegated authority to act on behalf of Mr. Dubble or the PAM position to which she is normally assigned to support.

For each of these reasons Ms. Tegner's position should not be allocated to the Administrative Assistant 3 class.

Comparison of Duties to Office Assistant 3

The Class Series Concept of the Office Assistant series states that positions perform "a variety of clerical duties in support of office or unit operations."

The Definition for Office Assistant 3 states:

Under general supervision, independently perform a variety of complex clerical projects and assignments such as preparing reports, preparing, reviewing, verifying and processing fiscal documents and/or financial records, composing correspondence such as transmittals and responses to frequent requests for information, establishing manual or electronic recordkeeping/filing systems and/or data base files, and responding to inquiries requiring substantive knowledge of office/departmental policies and procedures. Positions may perform specialized complex word processing tasks in a word processing unit or complex rapid data inquiry and/or entry functions.

The Distinguishing Characteristics for Office Assistant 3 include the following:

Assignments and projects are of a complex nature. Independent performance of complex clerical assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures. . . .

A portion of Ms. Tegner's position falls within the scope of this class. Approximately forty percent of Ms. Tegner's time is spent performing a variety of complex clerical duties consistent with the OA 3 level class regarding the Redwood unit's daily operations.

For example, Ms. Tegner addresses daily Resident inquiries and correspondence. She responds to questions regarding unit policies, procedures and finding information for Residents from other departments. She prepares, compiles and enters information into the agency's various tracking systems such as maintenance work orders and equipment and supply orders. She also submits forms requesting employee reimbursements. She routinely enters and submits employee payroll and personnel paperwork, and checks fire drill and other documentation for record keeping purposes. She also collects, compiles, updates, and processes various resident information into spreadsheets such as exception meeting requests, waivers and meal sharing requests. She tracks unauthorized absences and where every line staff in the facility works which includes work schedules and other information.

However, this class describes positions which independently perform a variety of complex clerical projects and duties in support of daily office or unit operations. As a whole, the focus of Ms. Tegner's position is more secretarial in nature. The majority of her duties include providing secretarial support to her supervisor and/or other staff supervisors to assist in facilitating their work and relieving them of clerical detail regarding the unit's daily operations.

Further, this series does not address the full extent and scope of her responsibility for applying her knowledge of her supervisor's and unit supervisors' work commitments and performing related secretarial support duties for management and supervisory staff within the unit.

While there is a significant overlap with the Office Assistant 3 class with respect to Ms. Tegner's duties, the primary focus of Ms. Tegner's position and the majority of her duties as a whole are more secretarial in nature and better align with the Secretary Class series concept which states:

In support of a supervisor and/or staff members, provides secretarial services and assistance for the purpose of facilitating the supervisor's and/or staff members' own work and relieving the supervisor and/or staff members of day-to-day clerical detail. Applies knowledge of supervisor's and/or staff members' work commitments including status of projects and nature of contacts. Secretarial duties include making travel arrangements, scheduling meetings, taking notes and transcribing minutes, screening calls and visitors, keeping supervisor's and/or staff members calendar(s) and committing supervisor's and/or staff members' time.

As a whole, Ms. Tegner's position is more in line with providing secretarial services and assistance to her supervisor and the unit's supervisory staff. This includes primary responsibility for managing calendars, scheduling meetings, taking notes and regularly transcribing minutes from several unit meetings, knowing and updating her regularly assigned supervisor's (PAM) calendar to coordinate activities with the unit's supervisory staff and answering and responding to Resident inquiries and requests on the PAM's behalf.

For these reasons her position should not be allocated to the Office Assistant 3 job class.

Comparison of Duties to Secretary

The Definition for this class states:

Perform routine secretarial duties such as making travel arrangements, scheduling meetings and/or classes, taking notes and transcribing minutes, keeping supervisors and/or staff member's calendar(s), producing final copy documents from drafts, composing forms and letters, and responding to inquiries from staff, students, and/or the public regarding departmental procedures or services.

Duties and assignments are of a routine nature. Routine duties are recurring and accomplished by following established work methods or procedures. Within established guidelines, independently organizes, prioritizes, and initiates work activities. Decision making authority is limited to choice of appropriate methods or procedures. Guidance is provided in new or unusual situations. Deviation from established methods, procedures, or guidelines requires approval. Work is periodically reviewed to verify compliance with policies, procedures, or standards.

While a portion of Ms. Tegner's duties involve performing routine secretarial work, this class does not address the scope and overall level of responsibility Ms. Tegner has in coordinating the daily office operations of her unit on behalf of her supervisor or her performance of other complex secretarial work.

For these reasons her position should not be allocated to the Secretary class.

Comparison of Duties to Secretary Senior

The Definition of the Secretary Senior class states:

Perform complex secretarial duties such as independently planning, organizing and prioritizing work, monitoring and evaluating budget(s) status and initiating corrections, developing travel itineraries, compiling reports, studies, and/or applications, developing, modifying, and/or maintaining data base management, office record keeping, or filing system(s), establishing office procedures, standards, priorities, and deadlines, and coordinating office operations. Positions initiate action to ensure work unit and/or office goals are met and have frequent contacts with clients, the public, staff members from other departments, students, and faculty.

Assignments and projects are of a complex nature. Independent performance of complex secretarial assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures.

Ms. Tegner's position performs complex secretarial work. She independently plans, organizes and prioritizes her work activities. She monitors and tracks a variety of information for the Redwood unit. Her position is independently responsible for developing, modifying, and maintaining resident related information and data, office record keeping and filing systems. She establishes and maintains office procedures, standards, priorities, and deadlines. She coordinates the Resident unit's daily office operations on behalf of her supervisor. In addition she provides complex clerical support for her supervisor.

Further, this class more accurately addresses the extent and full scope of her responsibility for applying her knowledge of her supervisor's and unit supervisors' work commitments and performing secretarial support duties. For example, secretarial duties include managing calendars, attending scheduled meetings on her supervisor's behalf, taking notes and regularly transcribing minutes from those meetings, knowing and updating her regularly assigned supervisor's (PAM) calendar to coordinate activities with the unit's supervisory staff and answering and responding to Resident inquiries and requests on the PAM's behalf.

Although examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification. While not exact, the Secretary Senior typical work examples that most align with the level and scope of your duties and responsibilities include:

- Formatting transcription from rough draft and taking meeting minutes;
- Composing letters, meeting notices, and agendas;
- Compiling and producing reports;
- Scheduling duties;
- Proofreading materials;

- Resolving and responding to inquiries regarding procedures and services;
- Answers telephones, receiving, screening, and referring visitors;
- Establishing office procedures, standards, priorities, and deadlines;
- Establishing or revising electronic or manual files;
- Completing or processes requisitions, invoices and payroll;
- Attending meetings on behalf of supervisor(s) or work group and representing supervisor or work group in supervisor's absence;
- Ordering supplies and equipment;
- Using spreadsheet and data base software to develop and maintain records;
- Preparing spreadsheets involving the development of formulas and combining files to create reports.

Overall, Ms. Tegner's duties are consistent with these statements. Ms. Tegner's position facilitates the work of the Redwood unit and relieves her supervisor and the other supervisors reporting to him of day-to-day clerical details.

For example, Ms. Tegner coordinates, organizes and compiles all information on behalf of her supervisor for the various meetings that occur on a daily, weekly, and monthly basis such as preparing all materials for the program area Treatment Team for the monthly Community Meetings for each unit. She also represents her supervisor every morning at the Special Conditions meetings held jointly with the Clinical department. She provides updated information to her supervisor when he attends so that he is prepared for the meetings. She also writes memorandums on behalf of the PAM. She also completes all inquiries regarding paperwork submitted by Residents and produces other correspondence on his behalf as needed. She also recommended and received approval to change the procedure regarding how residents submit items for the Community Meeting agenda to reduce bullying and other activities reported in the living units.

She also tracks and ensures requirements are met for processing Resident issues. She applies her knowledge of her supervisor's work commitments to communicate with staff to notify them of her supervisor and the other unit supervisor's schedules to discuss work related issues. A portion of her work includes taking and relaying messages, monitoring calendars, and providing a level of secretarial support to her supervisor and the Resident unit's supervisors. This was also confirmed during the review conference by Ms. Iwata as she acknowledged the scope of Ms. Tegner's secretarial duties and stated that the focus of her position is to provide secretarial-related support to her supervisor and the unit's supervisors.

When determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

In this case, the majority of the duties assigned to Ms. Tegner's position and her level of responsibility and delegated authority are best described by the Secretary Senior classification. Ms. Tegner's position should be reallocated to that class.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to the Washington personnel resources board. Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is PO Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located on the 3rd floor of the Raad Building, 128 10th Avenue SW, Olympia, Washington. The main telephone number is (360) 407-4101, and the fax number is (360) 586-4694.

If no further action is taken, the Director's determination becomes final.

c: Jennifer Tegner
Ellen Andrews, DSHS
Lisa Skriletz, State HR

Enclosure: List of Exhibits

JENNIFER TEGNER v DSHS

ALLO-13-066

List of Exhibits

A. Jennifer Tegner Exhibits

1. Letter of appeal from Jennifer Tegner received August 23, 2013 by State HR Director's Review program (Note: This letter is superseded by exhibit A-33)
2. SCC Assistant Director – Residential and Medical Organizational Chart (Employee note: Missing from Class and Comp Packet submitted to Special Commitment Center HR with original request – Ms. Iwata requested when it was made my knowledge was missing)
3. Spreadsheet of all staff schedules and units assigned – one unit submitted as example
4. Spreadsheet of all staff assigned to my program area of unauthorized attendance and “boat lates” – one month submitted as example
5. Documentation PowerPoint – currently used in New Employee Orientation for the facility
6. Employment 101 PowerPoint – currently used in New Employee Orientation for the facility
7. Receiving and Delivering Property Disposition Form – Created form, now currently used in the mailroom
8. Email to lower level supervisor – relaying assignment from Program Area Manager to lower level supervisor example
9. Memo written on behalf of Todd Dubble to staff example
10. Exception Request Form – Revamped and updated old form
11. Payroll policy and procedure interpreted for staff – Written on Managers behalf, emailed out by Program Area Manager Al Nerio to all residential staff in the facility
12. All staff memo written on behalf of Todd Dubble
13. Fire Drill – Created form, collect completed forms from staff monthly
14. Policy Narrative/Interpretation example for residents, posted in unit
15. New Policy memo – written on behalf of Assistant Director, distributed to all residential staff in facility
16. Job Duties List – Submitted to Ms. Iwata prior to phone interview
17. Extra Duties Timeline – Submitted to Ms. Iwata prior to phone interview
18. Payroll spreadsheet – Developed and maintained daily for each area and each shift, submitted to payroll with all documentation turned in by employees
19. Memo written to resident on behalf of Treatment Team
20. Treatment Team Minutes Example – Written by myself and submitted interdepartmentally

21. Community Meeting Minutes Example – Written for PAM for each unit monthly
22. Placement Committee Minutes – Written and sent out to various staff facility wide weekly
23. Special Conditions Meeting Form – Completed daily with minutes from meeting, also revamped form for efficiency
24. Directive email from Todd Dubble to coordinate staff training for CPR/First Aid
25. Staff Professionalism Memo – Written on PAM's behalf to all staff assigned to unit.
26. PDP – Written on PAM's request, also attached email sent to PAM with attachment
27. Room Search Dialog Form – Asked by Director of Facility and Head of Investigations to create this form for facility use
28. RTF Exceptions List Form – Research all items listed, get appropriate signatures on documents resident submit with request, complete form and submit prior to meeting

Exhibits submitted during the review conference:

29. Email from Randy Pecheos to Jennifer Tegner dated May 6, 2014 (Note: Out of scope of review)
30. Email from Heather Sacha to Todd Dubble, et. al. dated May 5, 2014 (Note: Out of scope of review)
31. Email from Kristina Sparks to Jennifer Tegner dated May 12, 2014 (Note: Out of scope of review)
32. Email from Melissa Hall to Jennifer Tegner dated May 8, 2014 (Note: Out of scope of review)
33. Replacement of the Letter of Appeal from Jennifer Tegner to State HR Director's Review Program with original date of August 10, 2013 (Note: This supersedes exhibit A-1)

B. DSHS Exhibits

1. Allocation Determination Letter from C.J. Iwata to Jennifer Tegner dated July 26, 2013
2. Updated Position Description form for Jennifer Tegner received July 12, 2013
3. SCC Program Area 3 Organizational Chart dated March 1, 2013
4. Position Review Request form for Jennifer Tegner received by DSHS CCU on July 11, 2013
5. State HR class specification for Office Assistant 1, 100 H
6. State HR class specification for Office Assistant 3, 100J
7. State HR class specification for Secretary, 100S
8. State HR class specification for Secretary Senior, 100T
9. State HR class specification for Administrative Assistant 1, 105E
10. State HR class specification for Administrative Assistant 2, 105F
11. State HR class specification Administrative Assistant 3, 105G