



PERSONNEL ADMINISTRATION COMMITTEE

Monroe County Courthouse, Room 306
100 W Kirkwood Avenue
Bloomington, Indiana 47404
Office: 812-349-7312
CouncilOffice@co.monroe.in.us

Peter Iversen, Chair
Marty Hawk
Geoff McKim

PERSONNEL ADMINISTRATION COMMITTEE Monday, May 13, 2024 at 12:00 PM (Noon) HR-Council Conference Room and Teams Connection

[Click here to join the meeting](#)

Meeting ID: 292 940 213 494

Passcode: UUX87t

- The public's video feed will be turned off by the Technical Services Department meeting administrator.
- The public will be able to listen and record.
- The public should raise their hand if they wish to speak during the public comment period.

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"Anyone who requires an auxiliary aid or service for effective communication, or a modification of policies or procedures to participate in a program, service, or activity of Monroe County, should contact the Monroe County Title VI Coordinator, E Sensenstein, (812) 349-7314, esensenstein@co.monroe.in.us, as soon as possible, but no later than forty-eight (48) hours before the scheduled event. Individuals requiring special language services should, if possible, contact the Monroe County Title VI Coordinator at last seventy-two (72) hours prior to the date on which the services will be needed. The meeting is open to the public."

1. CALL TO ORDER

2. ADOPTION OF AGENDA

3. YOUTH SERVICES BUREAU, Victoria Thevenow and Vanessa Schmidt Request the Creation of a New Position and to Amend a Job Description

-Training and Development Manager (New)
-Office Manager

3

The Bureau has requested a new position to centralize the ongoing responsibilities around training and continued development to one person in the organization. This is an attempt to help with accountability and ensure that all staff are trained in accordance with increasing grant, licensure, and contractual requirements.

4. BOARD OF COMMISSIONERS, Angie Purdie and Martha Miller Request the Creation of a New Position and to Amend a Job Description

-Conservation Resource Specialist
-Soil and Water Conservation Manager

24

The Soil and Water Conservation District wishes to add a new full-time employee, Conservation Resource Specialist, and amend the SWCD Manager position to reflect additional duties required with the addition of the new position. Both positions have the support of the Board of Commissioners.

PERSONNEL ADMINISTRATION COMMITTEE

Agenda Request Form

Complete ALL applicable highlighted areas below.

DEPARTMENT: **YSB** MEETING DATE REQUESTED (*Tentative*): **4/2/2024**
Request Presenter(s): **Victoria Thevenow and Vanessa Schmidt** Phone: **812-349-5013**

Was the Council Liaison notified prior to submitting this Agenda Request: **YES**

FUND INFORMATION: (*Mark with an "X" in all applicable boxes*)

Fund Name: **LIT**

Fund Number: **1114** Location Number: **0166**

PURPOSE OF REQUEST: (*Mark with an "X" in all applicable boxes*)

☒ Creation of New Position Title: **Training and Development Manager**

☐ Amend Current Position Description Title:

Hours: **40** Classification: **PAT** Level: **C**

☐ Other (*Specify*)

Narrative: Give a **DETAILED SUMMARY** explanation for the request (*purpose, action needed, etc.*) .

Youth Services Bureau is requesting a new position to centralize the ongoing responsibilities around training and continued development to one person in the organization. This is an attempt to help with accountable and ensure that all staff are trained in accordance with our increasing grant, licensure, and contractual requirements.

Forward entire Request Form with all supporting documents to: councilrequests@co.monroe.in.us

Contact the Council Administrator (Ext. 2516) with any questions regarding the Agenda Request Form.

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Job title Training and Development Manager

Fund-Account-
Location _____

Department Youth Services Bureau

Date _____

☒ Full-time ☐ Part-time ☒ Exempt ☐ Non-exempt

Current Classification N/A Requested Classification PAT C

Current pay \$ _____ per _____ Proposed pay \$ _____ per _____

Employee(s) in this position: *(attach supplemental sheet if necessary)*

N/A

TYPE OF ACTION REQUESTED

- ☒ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☐ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

This position is new to the agency and will require the necessary review.

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐ yes ☒ no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and ~~Strikethrough~~ for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☐ yes ☐ no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title Office Manager *Classification COMOT C

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐ yes ☒ no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☒ yes ☐ no If yes, please explain:

This request is to centralize and assign the responsibilities to one position.

There is an increase in training requirements annually, requiring more tracking and compliance.

7. If you answered yes, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☒ yes ☐ no If yes, please describe, including estimated costs:

YSB has the existing technology to track for compliance, Bamboo HR software system.

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

This position will work to ensure YSB staff are trained and effective with the at-risk youth that we serve, while assisting

the agency to maintain compliance and meet the expectations of external funding sources, licensure requirements, and contractual obligations.

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

Employee signature

Date

4/22/24

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.

If disagree, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Signature of Elected Official/Department Head

Date

Victoria Thevenow

4/23/2024

Name typed or printed

Victoria Thevenow

Date 4-23-2020

Employee Job Questionnaire

COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title: Development and Training Manager

Department: Youth Services Bureau of Monroe County

Employee Name: N/A

FLSA Status: ☒ Exempt ☐ Non-exempt

• Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

• Instructions •

1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.
4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

DO NOT DETACH THIS INSTRUCTION SHEET

Section I

Essential Functions of Position

1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Development and Training Manager is responsible for facilitation, coordination, compliance and quality assurance of agency training.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

If Duties Section of your existing job description is accurate please note "see existing description" and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
<i>Supervise subordinate personnel</i>	<u>B</u>	<u>G</u>
<u>ESSENTIALITY</u>	<u>FREQUENCY</u>	
A= Marginal function of the job	C= Perform annually at a minimum	
B= Essential function of the job	D= Perform quarterly at a minimum	
	E= Perform monthly at a minimum	
	F= Perform weekly at a minimum	
	G= Perform on regular (daily) basis	

List Primary Duties:

1. Responsible for the coordination and implementation of overall staff training, quality assurance activities, while maintaining various training certifications.

Essen **Freq**

B G

2. Responsible for developing, delivering, and updating base orientation of new staff to the YSB agency, and serves to educate staff on youth related topics, as identified.

B G

3. Serves as the primary trainer to all YSB staff in the following areas: Crisis Prevention Intervention, CPR/1st Aid/AED training, ServSafe, Universal Precautions, and general obligations of various program contract delivery for direct care workers. B G
4. Serves as the on-boarding staff trainer for all new YSB employees. B G
5. Assist in the implementation of quality assurance activities such as training, information sharing, education, creating and implementing annual training calendar and other staff development activities. B G
6. Reviews client exit surveys and provides summary reports of results. B F
7. Attends and/or facilitates YSB staff meetings in regard to providing training and brief training refreshers as needed. B F
8. Assist in the creation, implementation, monitoring, and evaluating the effectiveness of staff training/workshops/on-boarding involved with employment at YSB. B G
9. Scheduled observation shifts in emergency shelter program and performs direct observation of staff to ensure proper use of all training related skills and guidelines. B E

10. As appropriate, assists supervisors with the evaluation of training needs and serves as a resource for remedial training to staff, when identified by YSB program coordinators/directors within the department. ☐ B ☐ G
11. Assists in the planning of the annual staff retreat in coordination with other staff. ☐ A ☐ C
12. Attends a variety of meetings, seminars, and professional development workshops as required. Makes public presentations on youth issues, as needed. ☐ A ☐ D
13. Assures department compliance with all accrediting and licensing requirements in relation to training needs of YSB staff, meeting with licensing officials, assisting licensing officials during inspection and correcting instances of non-compliance in this area. ☐ B ☐ D
14. Performs related duties as assigned. ☐ A ☐ G

Section II

Job Requirements/Training/Certification

1. Check level of formal education that is required for your position. When specifying college degrees, please identify acceptable fields of study.

☐ High school diploma/GED ☐ Associate Degree ☒ Baccalaureate Degree ☐ Masters Degree

☐ Other (Please describe):

Acceptable fields of study:

2. Specialized training, certification, and/or specific experience required for your position (such as Certified Public Accountant).

3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Ability to obtain instructor certifications in ServSafe, Red Cross, Crisis Prevention Intervention training.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Training manuals and materials, Indiana Administrative Codes

5. Does your position require that you have a valid driver's license? ☒ Yes ☐ No If yes, for which duties?

6. Does your position require you to be at least 21 years of age? ☒ Yes ☐ No

7. Does your position require passage of a:

Medical exam? ☒ Yes ☐ No

Drug test? ☒ Yes ☐ No

Psychological exam? ☐ Yes ☐ No

Written exam? ☐ Yes ☐ No

Other tests:

8. Check and list equipment you operate as a regular part of performing your duties:

☒ Computer ☐ Typewriter ☐ Calculator ☐ Transcriber/dictaphone ☐ Vehicle

☐ Other (Please describe)

9. Your fundamental job duties may involve some relationship between you and data (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that most accurately describe your involvement with data.

☒ Compare or observe similarities and differences between data, people, or things.

☐ Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.

☐ Compile, collate, or classify data.

☒ Analyze, evaluate, observe, diagnose, investigate.

☐ Coordinate, place, make determinations, take action based on data analysis.

☐ Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that most accurately apply to your job responsibilities.

- ☒ Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- ☐ File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- ☒ Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- ☒ Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

Section III

Difficulty of Work/Responsibility

1. Which of the following phrases best describes the type of supervision you receive?

- ☐ **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- ☐ **Assignments and objectives set jointly by immediate supervisor and myself.** Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- ☒ **Indirect or occasional supervision.** Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- ☐ **General supervision.** Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- ☐ **Administrative or advisory direction from a board or CEO.** Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

2. Which of the following phrases best describes the criteria for which your work is reviewed?

Work is reviewed primarily for...

- | | |
|---|--|
| <input type="checkbox"/> Attainment of objectives | <input type="checkbox"/> Appropriate supervision or direction of assigned operations |
| <input checked="" type="checkbox"/> Compliance with precedent | <input checked="" type="checkbox"/> Adherence to instructions/guidelines |
| <input checked="" type="checkbox"/> Technical accuracy | <input type="checkbox"/> Compliance with legal requirements |
| <input checked="" type="checkbox"/> Soundness of judgment | <input checked="" type="checkbox"/> Compliance with Department policy |
| | <input checked="" type="checkbox"/> Effect on Department goals/objectives |
| | <input type="checkbox"/> Other (please describe): |

If you checked more than two, please provide explanation:

Must ensure training competency and compliance with multiple bodies and departmental policies to meet agency objectives/requirements.

3. Check one of the following statements that most accurately describes the judgment you use in performing fundamental job duties.

- ☐ Decisions are always determined by specific instructions or existing, well established policies and procedures.
- ☐ On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- ☒ Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- ☐ Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- ☐ Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- ☐ Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

Evaluation of training competency.

5. What programs, persons and/or functions are directly affected by the decisions you make?

All YSB programs.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Determining staff actions are not aligned with training and/or policy, or staff is not meeting training competency expectations.
Board of Judges, YSB Executive Director, Deputy Director and Program Director may overrule

Section IV

Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Sara Jamieson

Title: Program Coordinator

2. Complete A) and B) only if you supervise or direct the work of others:

A) List names and position titles of employees you supervise or direct as a regular part of your duties.

B) Check which statements most accurately describe your managerial/supervisory responsibilities.

- ☐ Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
- ☐ Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
- ☐ Interview candidates for openings and make hiring recommendations.
- ☐ Make hiring decisions.
- ☒ Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
- ☐ Plan, delegate and control work assignments and special projects to assigned staff.
- ☐ Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
- ☒ Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
- ☐ Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
- ☒ Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
- ☐ Review salaries of assigned staff and recommend changes when warranted.
- ☐ Recommend personnel actions, such as promotions, transfers, demotions.
- ☐ Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
- ☐ Maintain discipline and recommend corrective action as warranted.
- ☐ Communicate and administer personnel programs and procedures for my area in accordance with approved policies.

3. List other departments, agencies, organizations, and others with whom you regularly communicate.

No regular communication expected outside of YSB.

4. Check which statements most accurately describe your contact with employees, customers, governmental officials, or the general public.

- ☒ **Cooperative Work Relationship:** Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
- ☐ **Render Service:** Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
- ☒ **Instruct:** Teach or present subject matter to others through explanation, demonstration and supervised practice.
- ☐ **Negotiate:** Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

- ☐ **Mentor:** Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

Section V

Physical Effort/Work Environment

1. Which of the following best describes your primary working environment?

- ☐ Laboratory ☒ Standard office ☐ Storeroom ☐ Vehicle ☐ Outdoors
☐ Garage/shop ☐ Manufacturing setting ☐ Other (please describe):

If you checked more than one, please provide additional explanation.

2. Which of the following best describes your primary working conditions?

ESSENTIALITY

N/A= Not Applicable to job

A= Marginal requirement of job

B= Essential requirement of job

Essentiality

- work alone with minimum supervision
 work under time pressure
 work on several tasks at the same time
 read/carry out simple written instructions
 apply knowledge of people, locations
 plan and layout assigned work projects
 compute/calculate, such as interest
 count, make simple arithmetic additions/subtractions
 read/interpret detailed prints, sketches, layouts, specifications, maps
 prepare detailed reports, such as financial statements, sales activity, product feasibility
 plan and present public speaking presentations, fund raisers, special events
 sitting & walking at will
 standing/walking for long periods

Essentiality

- work with others in a team environment
 work rapidly for long periods
 understand and carry out oral instructions
 memorize and retain instructions
 present findings in oral or written form
 testify in legal proceedings/court
 sitting for long periods
 walking on uneven terrain

<input type="checkbox"/> N/A	work in extreme hot or cold temperatures	<input type="checkbox"/> N/A	work in wet/icy surroundings
<input type="checkbox"/> A	respond to emergencies from off-duty status	<input type="checkbox"/> A	work with or near chemicals (please list)
<input type="checkbox"/> N/A	work near fumes, odors, dust, dirt (please describe)	<div style="border: 1px solid black; padding: 5px;"> <p>May occasionally work near/with cleaning products.</p> <p>Noise source may be a result of working in Emergency shelter with youth.</p> </div>	
<input type="checkbox"/> A	work in a noisy environment (describe noise source)		
<input type="checkbox"/> N/A	work in confined areas (please describe)		
<input type="checkbox"/> N/A	wear protective clothing or equipment (please describe)		
<input type="checkbox"/> N/A	work in high places, such as ladders, roofs, bucket truck (please describe)		
<input type="checkbox"/> N/A	work with or exposed to violent/irate individuals (please describe)		
<input type="checkbox"/> N/A	respond to situations involving potential physical harm to self and others (please describe)		
<input type="checkbox"/> A	lifting under 25 pounds	<input type="checkbox"/> N/A	lifting 25 to 50 pounds
<input type="checkbox"/> N/A	pushing/pulling objects	<input type="checkbox"/> A	carrying objects
<input type="checkbox"/> A	bending at waist	<input type="checkbox"/> A	reaching
<input type="checkbox"/> A	close vision	<input type="checkbox"/> A	far vision
<input type="checkbox"/> N/A	depth perception	<input type="checkbox"/> B	speaking clearly
<input type="checkbox"/> A	handling/grasping objects	<input type="checkbox"/> N/A	fingering objects (picking, pinching)
<input type="checkbox"/> N/A		<input type="checkbox"/> N/A	lifting over 50 pounds
		<input type="checkbox"/> A	crouching/kneeling
		<input type="checkbox"/> A	driving
		<input type="checkbox"/> N/A	color perception
		<input type="checkbox"/> B	hearing sounds/communication

3. List the three most physically demanding activities you regularly perform in your job.

Crisis Prevention Intervention training

Red Cross/First Aid training

Standing, walking, sitting.

4. List the three most emotionally demanding activities you regularly perform in your job.

Training competency evaluation

Retrain staff deficiencies

Vicarious trauma

5. What is your normal work schedule (example, 8 a.m. 4 p.m. M-F)?

Position will require a flexible working shedule

6. Are you required to:

a. work extended hours

Never

Regularly

Occasionally

☐
☐
☒

b. work weekends

☐
☐
☒

	<u>Never</u>	<u>Regularly</u>	<u>Occasionally</u>
c. work evenings	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
d. travel out of town, but not overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For what purpose?			
<div>Trainings, conferences.</div>			
c. travel out of town overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For what purpose?			
<div>Trainings, conferences.</div>			
f. respond to emergencies on 24-hr basis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
g. on call on rotation basis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Section VI

Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Hire date

Title Department

Signature Date

Supervisor: I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Signature

Christina Greenawald

 Date

4/23/2024

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc.
118 South Franklin Street
Muncie, IN 47305
Phone: (765) 286-5195
Fax: (765) 286-2824

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Office Manager
DEPARTMENT: Youth Services Bureau
WORK SCHEDULE: As Assigned
JOB CATEGORY: COMOT C (*Computer, Office Machine Operation, Technician*)

DATE WRITTEN: January 2007

STATUS: Full-time

DATE REVISED: December 2014, February 2021

FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Office Manager for the Youth Services Bureau of Monroe County, responsible for performing a variety of department bookkeeping functions, providing administrative support to department staff, and assisting Shelter staff with completing a variety of clerical duties and assisting the public.

DUTIES:

Answers telephone and greet office visitors, ensuring all people entering the building are checked in properly, providing information and assistance, taking messages, scheduling appointment/meeting locations and/or transferring/directing to appropriate individual or department.

Types a variety of documents, including but not limited to, correspondence, forms, and reports. Collects and enters data for yearly reports and develops and updates spreadsheets for agency statistical record keeping on computer as appropriate. Manages and organizes various documents and files, including media archives and over 18 files.

Maintains files for all Youth Services Bureau equipment inventory and related files, such as vendors, repair services, and maintenance contracts. Assures equipment repairs are complete and processes pay claims accordingly.

Prepares purchase orders and claims for all Youth Services Bureau budgets, including calculating/verifying charges and totals, completing forms, obtaining signatures, submitting to Auditor, and recording claims and checks in the appropriate software used by the County.

Monitors and recommends necessary line-item transfers to the Finance and Personnel Coordinator as needed to help maintain positive account balances. Obtains and submits price quotes. Maintains and continually updates vendor files, communicating with vendors on a regular basis regarding purchase, deliveries, and payments.

Prepares receipt forms for any funds received in house. Delivers all checks/cash to the Auditor.

Prepares and maintains bi-weekly payroll for Youth Services Bureau staff. Submits payroll to Auditor and reconciles with Youth Services Bureau's ledgers and database. Discusses any discrepancies and shortages with Financial Coordinator. Records time off in Personnel Software.

Prepares, maintains, and reports all personnel matters to the Youth Services Bureau Directors and Supervisors and County Auditor as required. Reviews, recommends, and communicates Court/Youth Services Bureau policies and procedures regarding personnel matters to the Executive Director, Deputy Director, and Program Coordinator. Prepares and maintains Employee Service records and submits to Auditor annually.

Monitors and maintains office supplies and functioning of office equipment, notifying vendors when repairs are necessary. Coordinates the maintenance and repair of buildings, grounds, and telephone and computer systems. Oversees work of cleaning and grounds contractor and processes work orders.

Prepares department newsletter, including researching, collecting information, writing, typing on computer, editing, and printing and mailing. Develops and produces various public relations/marketing materials, such as posters brochures. Maintains various bulletin boards and staff recognitions, such as anniversaries and birthdays. Restocks literature as needed.

Processes background checks and confidentiality agreements for all volunteers and service workers.

Provides new employees with mail boxes, office identification, and time cards and obtains photo. Maintains and updates Shelter phone directory as needed.

Maintain In-Kind donations log and research value for yearly report.

Coordinates special projects as assigned, including scheduling and attending meetings, preparing materials, and sending mailings.

Plans, organizes, coordinates, and/or assists in the execution of special events for Youth Services Bureau by gathering appropriate materials available for various events, including but not limited to, staff retreats, reviews, audits, celebrations, and community activities.

Arranges conference registrations and domestic travel, including hotel accommodations, flight reservations, and transportation, and maintains travel records for staff attending functions in or out of town. Prepares and submit any necessary travel requests to the Presiding Judge.

Maintains and organizes all storage space within the Youth Services Facility.

Drives to County Courthouse and other locations to conduct office business, including receiving/delivering documents and mail.

Maintains YSB website with suggestions form leadership team and updates as needed.

Purchases groceries for Shelter food preparation, including researching costs, monitoring food supplies, driving to supply locations, making payments, reviewing orders for accuracy, and loading/unloading groceries and shelter supplies. Reviews and improves efficiency within purchasing process.

Collects, opens, and distributes Youth Services Bureau mail as well as interdepartmental mail from the Courthouse.

Takes, prepares, and distributes minutes of staff meetings. Maintains calendar and schedule for large meeting rooms at YSB of Monroe County.

~~Creates and maintains training calendar once staff are scheduled for all in house trainings.~~
~~Prepares and maintains employee training records via Personnel Software and Excel.~~

Performs duties of Finance and Personnel Coordinator in his/her absence or as needed.

Attends a variety of meetings, seminars, and professional development workshops as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED.

Working knowledge of standard office practices and procedures and ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Working knowledge of Standard English grammar, spelling, and punctuation and ability to prepare written reports, correspondence, and documents as required.

Ability to accurately maintain and reconcile ledgers and other records and complete related financial reports and payroll records as required.

Ability to type with speed and accuracy and operate standard office equipment and software, such as telephone, switchboard, keyboard, calculator, copier, computer, fax machine, printer, and scanner.

Ability to effectively communicate orally and in writing with co-workers, other County personnel, related agencies, schools, Shelter residents and their families, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to effectively complete duties amidst frequent distractions and interruptions, occasionally under pressure of formal deadlines.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended, evening, and/or weekend hours and travel out of town for meetings/conferences.

Possession of a valid driver's license and demonstrated safe driving record.

II. RESPONSIBILITY:

Incumbent performs a variety of regular and routine duties, exercising judgment to ensure accurate and efficient completion of assigned work. Priorities are determined by a formal schedule with assignments guided by broad policies and/or general objectives. Errors in work are primarily detected or prevented through prior instructions from supervisor, and notification from other agencies, and standard bookkeeping checks. Undetected errors could result in loss of time for correction and/or inconvenience to other agencies or the public, or loss of money. Work is reviewed during critical phases and upon completion for accuracy and compliance with funding source regulations.

III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent communication with co-workers, other County personnel, related agencies, schools, Shelter residents and their families, and the public for purposes of exchanging and verifying information.

Incumbent reports directly to the Finance and Personnel Coordinator.

IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in standard office environment, involving sitting/walking at will, sitting for long periods, lifting/carrying objects weighing up to 25 pounds, keyboarding, speaking clearly, hearing sounds/communication, and handling/grasping/fingering objects.

Incumbent occasionally works extended, evening, and/or weekend hours and travels out of town for meetings/conferences.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Office Manager for the Youth Services Bureau of Monroe County describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes _____ No _____

Applicant/Employee signature

Date

Type or Print name

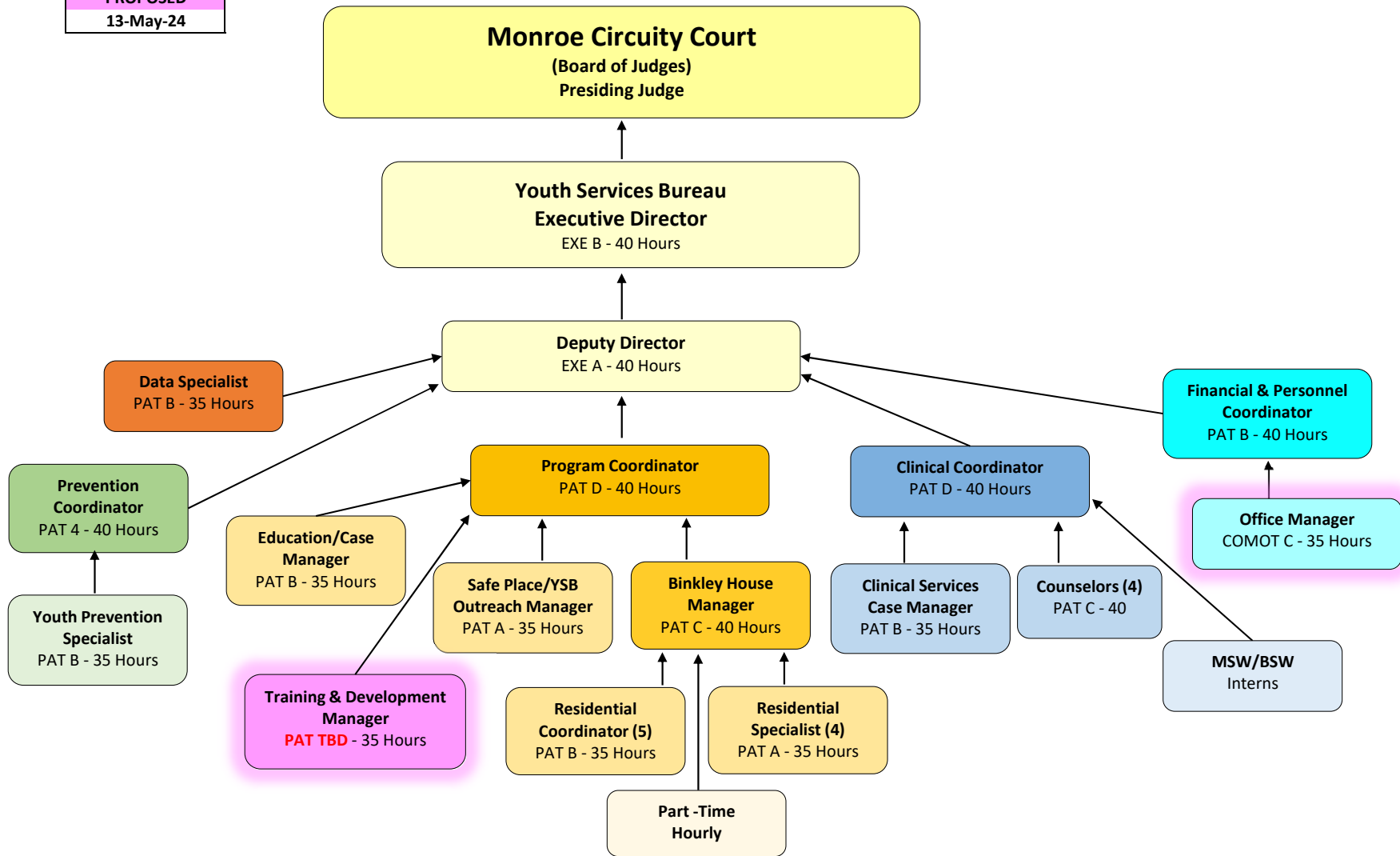
I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

PROPOSED
13-May-24





PERSONNEL ADMINISTRATION COMMITTEE AGENDA REQUEST FORM

Forward request and corresponding documentation/information to:

COUNCILREQUESTS@CO.MONROE.IN.US

Contact the Council Office (ext. 7312) prior to submitting your request to obtain all necessary forms required.

Department: Board of Commissioners Presenter: Angie and Martha

REQUESTED Meeting Date: 5/11/2024

PURPOSE: (Prior to completing your request, [review the PAC Policies and Procedures here.](#))



Creation of a New Position

-Include WIS Job Classification Review Form, WIS Employee Job Questionnaire Form, & Word Job Description (if available)



Amend Current Position Description

-Include Red-Lined Job Description & WIS Job Classification Review Form.

NARRATIVE: (Provide a detailed summary explanation for the request.)

The SWCD wishes to add a new FTE: Conservation Resource Specialist and amend the SWCD Manager position to reflect additional duties required with the addition of the new position.

Both of these positions have the support of the Board of Commissioners.

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Conservation Resource Specialist
DEPARTMENT: Board of County Commissioners
WORK SCHEDULE: 8:00 am – 4:00 pm, M-F
JOB CATEGORY: TBD

DATE WRITTEN: December 2023

STATUS: Full-Time
FLSA STATUS: TBD

Incumbent serves as Conservation Resource Specialist for the Monroe County Soil and Water Conservation District, responsible for providing landowners assistance and education about natural resources and conservation practices for Monroe County landowners and residents.

LIST PRIMARY DUTIES

Provides land management, financial and education resources to the residents of Monroe County through addressing and evaluating landowner resource concerns and needs through site visits, phone calls, video calls, or email and develops and implements field days and workshops as needed in coordination with the Monroe County Conservation Team, specifically supporting farmers and local and state organizations with field days associated with grants.

Provides educational outreach and planning. Develops landowner conservation plans that address conservation methods for improving soil health, protecting water quality and conservation of all things natural resource related.

Assists the community with questions and concerns specific to soil, water, and related natural resources by connecting them with local resources and grant opportunities.

Oversees the soil testing program: Collects samples as requested using soil probes, completes request forms, and packages samples for shipping. Reviews soil test results and shares best management practice options with landowners to improve soil health.

Works collaboratively with other Monroe County departments to provide resources, education, and outreach effectively and efficiently.

Promotes, attends, and/or participates in Indiana Conservation Partnership led programs and events at local and state levels.

Participates in active SWCD lead watershed planning or implementation projects and assists other watershed groups.

Assists with the creation of educational, promotional, technical, and public media materials.

Organize and lead volunteer water quality monitoring programs such as Hoosier River Watch.

Work as a member of the SWCD Conservation Team to execute the agreements of any MOU's with partners for improving soil health and water quality.

Attend monthly MCSWCD board meetings and other partnership meetings as needed.

Collect data and compile reports for assessing conservation needs and requests in the county.

Work with governmental partners at the local, state, and federal level as well as private industry to promote and develop programming for sustainable development and food production.

DRAFT

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the “Job Classification and Compensation Maintenance Plan” prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Job title Conservation Resource Specialist

Fund-Account-
Location _____

Department Commissioners/SWCD

Date _____

☒ Full-time ☐ Part-time ☐ Exempt ☐ Non-exempt

Current Classification _____ Requested Classification PAT

Current pay \$ _____ per _____ Proposed pay \$ 50,000.00 per Annually

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Grant funded at this time

TYPE OF ACTION REQUESTED

- ☒ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☐ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

**Questions 1 through 3 to be completed jointly by the employee and/or
Elected Official/Department Head initiating the review**

1. Describe why this new position/added employee/classification review is necessary.
Increase demand in resident/landowner requests for environmental conservation assistance/guidance on their land.

We have seen a tripled amount, in the past 10 years, of private and public landowners/residents (particularly in the Urban Areas) that are seeking one on one guidance in the areas of

water quality concerns, flooding issues, invasive species control, soil health for sustainable growing and additional general areas or conservation.

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐yes ☒no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and **Strikethrough** for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☐yes ☒no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒yes ☐no If yes, name those job title(s) and classifications:

Job title District Manager *Classification PAT

Job title Resource Conservation Specialist *Classification State Grant

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐yes ☒no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☒yes ☐no If yes, please explain:

There is a growing demand/interest by individual landowners/residents to become more environmentally conservation

focused and they are looking for recommendations and support from a county or local source. We do not have staff to support this growing need.

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☒ no If *yes*, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

Providing a one on one, face to face contact with residents/customers aids them in feeling they are being heard

by the county regarding their environment conservation concerns. It service as a positive face for encouraging and promoting conservation at a local level.

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

Employee signature

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☐ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

01/11/2024

Signature of Elected Official/Department Head

Date

Martha Miller

Digitally signed by Martha Miller
DN: cn=Martha Miller, o=Monroe Co Soil & Water Conservation
District, ou=email=mmiller@co.monroe.in.us, c=US
Date: 2024.01.11 10:14:55 -05'00'

Name typed or printed

Martha Miller

Employee Job Questionnaire

COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title: Conservation Resource Technician

Department: Board of Commissioners

Employee Name:

FLSA Status: ☐ Exempt ☐ Non-exempt

• Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

• Instructions •

1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.
4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

DO NOT DETACH THIS INSTRUCTION SHEET

Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does NOT involve performance evaluations of individuals. We aren't collecting information about how you perform, only what you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner, Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a “snap shot” of the basic functions of a position – it is not a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands the essential functions and the skills necessary to perform the job.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

- You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, “*Maintains statistics on computer for Indiana Department of Environmental Management (IDEM).*”
- Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, “*Complete XQ325 forms*” may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, “*Complete payment assistance application forms.*”
- Are **machines, equipment, or special tools** involved in accomplishing tasks? For example, “*Post payments*” could involve a computer or writing in manual ledgers, and “*Update maps*” could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

Section I

Essential Functions of Position

1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Responsible for providing landowner assistance and education about natural resources and conservation practices for Monroe County residents.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

If Duties Section of your existing job description is accurate please note “see existing description’ and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
<i>Supervise subordinate personnel</i>	<u>B</u>	<u>G</u>
<u>ESSENTIALITY</u>	<u>FREQUENCY</u>	
A= Marginal function of the job	C= Perform annually at a minimum	
B= Essential function of the job	D= Perform quarterly at a minimum	
	E= Perform monthly at a minimum	
	F= Perform weekly at a minimum	
	G= Perform on regular (daily) basis	

List Primary Duties:

Essen Freq

1. Provide land management, financial and educational resources to the residents of Monroe County through addressing and evaluate landowner resource concerns/needs through site visits, over the phone, via video options or email.

B G

2. Provide educational outreach and planning. Through developing landowner conservation plans that address conservation methods for improving soil health, protecting water quality and conservation of all things natural resource

B F

3. Assist the community with questions and concerns specific to soil, water, and related natural resources by connecting them with local resources and grant opportunities. B G
4. Oversee soil testing program: Collect samples as requested using soil probes, complete request forms, package samples for shipping. Review soil test results and share best management practice options with landowner to improve soil health. B F
5. Work collaboratively with other Monroe County Departments to provide resources, education, and outreach effectively and efficiently. B E
6. Promote, attend, and/or participate in Indiana Conservation Partnership led programs and events at local and state levels. A D
7. Participate in active SWCD lead watershed planning or implementation projects. As well as assist with other watershed groups. B E
8. Assist with the creation of educational, promotional, and technical materials and public media materials. A E
9. Organize and lead volunteer water quality programs such as Hoosier River Watch. A D

10. Work as a member of the SWCD Conservation Team to execute the agreements of any MOU's with partners for improving soil health and water quality. ☐ B ☐ F
11. Attend monthly MCSWCD board meetings and other partnership meetings as needed. ☐ B ☐ F
12. Collect data and compile reports for assessing conservation needs and requests in the county. ☐ A ☐ D
13. Work with governmental partners at the local, state and federal level as well as private industry to promote and develop programming for sustainable development and food production. ☐ B ☐ G
14. Execute watershed planning and implimentation of on the ground work when watershed projects are active. ☐ B ☐ D

Section II

Job Requirements/Training/Certification

1. Check level of formal education that is required for your position. When specifying college degrees, please identify acceptable fields of study.

☐ High school diploma/GED ☐ Associate Degree ☒ Baccalaureate Degree ☐ Masters Degree

☐ Other (Please describe):

Acceptable fields of study:

2. Specialized training, certification, and/or specific experience required for your position (such as Certified Public Accountant).

3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Ability to communicate what a soil health systems includes, urban and rural, sill to educate others about best management practices.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Natural Resource Conservation Service Technical Guide and Monroe County

5. Does your position require that you have a valid driver's license? ☒ Yes ☐ No If yes, for which duties?

6. Does your position require you to be at least 21 years of age? ☒ Yes ☐ No

7. Does your position require passage of a:

Medical exam? ☐ Yes ☒ No

Drug test? ☐ Yes ☒ No

Psychological exam? ☐ Yes ☒ No

Written exam? ☐ Yes ☒ No

Other tests: Need to pass a Federal Background Check

8. Check and list equipment you operate as a regular part of performing your duties:

☒ Computer ☐ Typewriter ☒ Calculator ☐ Transcriber/dictaphone ☒ Vehicle

☒ Other (Please describe) Soil Probe, Measuring Wheel, GIS Software

9. Your fundamental job duties may involve some relationship between you and data (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that most accurately describe your involvement with data.

☒ Compare or observe similarities and differences between data, people, or things.

☒ Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.

☒ Compile, collate, or classify data.

☒ Analyze, evaluate, observe, diagnose, investigate.

☒ Coordinate, place, make determinations, take action based on data analysis.

☒ Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that most accurately apply to your job responsibilities.

- ☒ Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- ☒ File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- ☒ Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- ☒ Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

Section III

Difficulty of Work/Responsibility

1. Which of the following phrases best describes the type of supervision you receive?

- ☐ **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- ☐ **Assignments and objectives set jointly by immediate supervisor and myself.** Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- ☐ **Indirect or occasional supervision.** Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- ☒ **General supervision.** Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- ☐ **Administrative or advisory direction from a board or CEO.** Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

2. Which of the following phrases best describes the criteria for which your work is reviewed?

Work is reviewed primarily for...

- | | |
|---|---|
| <input type="checkbox"/> Attainment of objectives | <input type="checkbox"/> Appropriate supervision or direction of assigned operations |
| <input type="checkbox"/> Compliance with precedent | <input checked="" type="checkbox"/> Adherence to instructions/guidelines |
| <input checked="" type="checkbox"/> Technical accuracy | <input type="checkbox"/> Compliance with legal requirements. |
| <input checked="" type="checkbox"/> Soundness of judgment | <input type="checkbox"/> Compliance with Department policy |
| | <input checked="" type="checkbox"/> Effect on Department goals/objectives |
| | <input type="checkbox"/> Other (please describe): |

If you checked more than two, please provide explanation:

The work done in this position can be technical as well judgment based and needs to address the goals and objectives of the SWCD and Mo Co

3. Check one of the following statements that most accurately describes the judgment you use in performing fundamental job duties.

- ☐ Decisions are always determined by specific instructions or existing, well established policies and procedures.
- ☐ On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- ☐ Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- ☐ Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- ☒ Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- ☐ Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

Being able to provide landowners with appropriate land resources and activities.

5. What programs, persons and/or functions are directly affected by the decisions you make?

What programs, persons and/or functions....

-Monroe County residents interested in environmental sustainability and climate change.

-Monroe County landowners and their future generations.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Technical: highest level of decision making is recommendation of landowners for funding. The MCSWCD Board of Supervisors is responsible for all fundings decisions.

Section IV

Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor:

Title:

2. Complete A) and B) only if you supervise or direct the work of others:

A) List names and position titles of employees you supervise or direct as a regular part of your duties.

B) Check which statements most accurately describe your managerial/supervisory responsibilities.

- ☐ Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
- ☐ Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
- ☐ Interview candidates for openings and make hiring recommendations.
- ☐ Make hiring decisions.
- ☒ Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
- ☐ Plan, delegate and control work assignments and special projects to assigned staff.
- ☐ Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
- ☐ Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
- ☐ Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
- ☐ Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
- ☐ Review salaries of assigned staff and recommend changes when warranted.
- ☐ Recommend personnel actions, such as promotions, transfers, demotions.
- ☒ Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
- ☐ Maintain discipline and recommend corrective action as warranted.
- ☐ Communicate and administer personnel programs and procedures for my area in accordance with approved policies.

3. List other departments, agencies, organizations, and others with whom you regularly communicate.

State Department of Agriculture, State Soil Conservation Board, County Stormwater, Other County Soil and Water Conservation Districts, County and State Invasive Species organizations (McIRIS and SICIM), Natural Resources and Conservation Service (NRCS), State Department of Enviro

4. Check which statements most accurately describe your contact with employees, customers, governmental officials, or the general public.

- ☒ **Cooperative Work Relationship:** Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
- ☒ **Render Service:** Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
- ☒ **Instruct:** Teach or present subject matter to others through explanation, demonstration and supervised practice.
- ☒ **Negotiate:** Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

- ☒ **Mentor:** Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

Section V

Physical Effort/Work Environment

1. Which of the following best describes your primary working environment?

- ☐ Laboratory ☐ Standard office ☐ Storeroom ☐ Vehicle ☒ Outdoors
☐ Garage/shop ☐ Manufacturing setting ☒ Other (please describe):

Office/computer based

If you checked more than one, please provide additional explanation.

This position is both inside at a desk and outside on the ground.

2. Which of the following best describes your primary working conditions?

ESSENTIALITY

N/A= Not Applicable to job

A= Marginal requirement of job

B= Essential requirement of job

Essentiality

- ☐ B work alone with minimum supervision
☐ A work under time pressure
☐ B work on several tasks at the same time
☐ B read/carry out simple written instructions
☐ B apply knowledge of people, locations
☐ B plan and layout assigned work projects
☐ A compute/calculate, such as interest
☐ A count, make simple arithmetic additions/subtractions
☐ B read/interpret detailed prints, sketches, layouts, specifications, maps
☐ A prepare detailed reports, such as financial statements, sales activity, product feasibility
☐ B plan and present public speaking presentations, fund raisers, special events
☐ B sitting & walking at will
☐ A standing/walking for long periods

Essentiality

- ☐ B work with others in a team environment
☐ A work rapidly for long periods
☐ A understand and carry out oral instructions
☐ A memorize and retain instructions
☐ B present findings in oral or written form
☐ N/A testify in legal proceedings/court
☐ A sitting for long periods
☐ B walking on uneven terrain

<input type="text" value="B"/> work in extreme hot or cold temperatures	<input type="text" value=""/> work in wet/icy surroundings	
<input type="text" value="N/A"/> respond to emergencies from off-duty status	<input type="text" value=""/> work with or near chemicals (please list)	
<input type="text" value="A"/> work near fumes, odors, dust, dirt (please describe)	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	
<input type="text" value="A"/> work in a noisy environment (describe noise source)		
<input type="text" value="N/A"/> work in confined areas (please describe)		
<input type="text" value="A"/> wear protective clothing or equipment (please describe)		
<input type="text" value="N/A"/> work in high places, such as ladders, roofs, bucket truck (please describe)		
<input type="text" value="A"/> work with or exposed to violent/irate individuals (please describe)		
<input type="text" value="N/A"/> respond to situations involving potential physical harm to self and others (please describe)		
<input type="text" value="B"/> lifting under 25 pounds	<input type="text" value="A"/> lifting 25 to 50 pounds	<input type="text" value="N/A"/> lifting over 50 pounds
<input type="text" value="B"/> pushing/pulling objects	<input type="text" value="A"/> carrying objects	<input type="text" value="B"/> crouching/kneeling
<input type="text" value="B"/> bending at waist	<input type="text" value="B"/> reaching	<input type="text" value="B"/> driving
<input type="text" value="B"/> close vision	<input type="text" value="B"/> far vision	<input type="text" value="B"/> color perception
<input type="text" value="B"/> depth perception	<input type="text" value="B"/> speaking clearly	<input type="text" value="B"/> hearing sounds/communication
<input type="text" value="B"/> handling/grasping objects	<input type="text" value="A"/> fingering objects (picking, pinching)	

3. List the three most physically demanding activities you regularly perform in your job.

4. List the three most emotionally demanding activities you regularly perform in your job.

5. What is your normal work schedule (example, 8 a.m. 4 p.m. M-F)?

6. Are you required to:

a. work extended hours

Never

Regularly

Occasionally

☐
☐
☒

b. work weekends

☐
☐
☒

	<u>Never</u>	<u>Regularly</u>	<u>Occasionally</u>
c. work evenings	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
d. travel out of town, but not overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
. For what purpose?			
<div>Trainings monthly</div>			
c. travel out of town overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For what purpose?			
<div>Trainings and conference3s</div>			
f. respond to emergencies on 24-hr basis	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. on call on rotation basis	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

The necessity for adaptive hours outside of the normal 8-4 workday when working with landowners and natural resource concerns and educationa

8. Is your position politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☐

Section VI

Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Hire date

Title Department

Signature Date

Supervisor: I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? **Yes ☐ No ☐**

Signature Date

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc.
118 South Franklin Street
Muncie, IN 47305
Phone: (765) 286-5195
Fax: (765) 286-2824

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: ~~SWCD~~ District Manager
DEPARTMENT: Board of County Commissioners
WORK SCHEDULE: 8:00 a.m. – 4:00 p.m., M-F
JOB CATEGORY: PAT B (*Professional, Administrative, Technological*)

DATE WRITTEN: September 1991

STATUS: Full-time

DATE REVISED: March 2014, February 2021

FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as ~~SWCD~~ **the** District Manager for the Monroe County ~~Commissioners~~ **Soil and Water Conservation District (MCSWCD)**, responsible for **overseeing the operations of the MCSWCD**, providing **supervisory**, managerial, administrative, **and** educational, ~~and technical~~ support. **Coordinates the development and implementation of the MCSWCD objectives and mission. to the Soil and Water Conservation District (SWCD) and Works with and reports to the MCSWCD Board of Supervisors in carrying out the District's program mission in conformance with the purpose of the District as defined by in Indiana District Law (IC 14-32).**

DUTIES:

Understands the purpose, powers, programs, and responsibilities of the ~~District~~ **MCSWCD**, and keeps **the Monroe County Board of State Supervisors and MCSWCD Board of** Supervisors informed about local, state, and federal regulations, laws, programs, and/or activities that may affect the ~~District~~ **MCSWCD**.

Oversees the operations and administration of the Department, which includes managing contracts, planning the annual meeting and writing the annual report.

Communicates with other departments, agencies, organizations, and the community to promote and encourage a strong conservation ethic and stewardship of the land in Monroe County.

Coordinates ~~District~~ **MCSWCD** programs with programs and activities of personnel from Indiana Conservation Partnership (ICP), **which is composed of the State Soil Conservation Board, ISDA, USDA Farm Service Agency, IDEM, Purdue Cooperative Extension Services, ISDNR, and Natural Resources Conservation Services, in addition to local County and City Government and private entities/organizations and other agencies** involved in the conservation of soil, water, and related natural resources. ~~and p~~ Provides leadership in planning and implementing the **MCSWCD's information outreach** and educational programs.

Serves as MCSWCD Financial Officer, including maintaining records of financial accounts and providing monthly and annual reports, collecting outstanding debits, making bank deposits, and writing checks, and filing all State Board of Accounts (SBOA) reports monthly and annually.

Provides analysis of fiscal needs to the MCSWCD Board of Supervisors and prepares, monitors, and manages the budget.

Coordinates and oversees the execution of grant applications and administers grants that are received including, but not limited to watershed grants for planning and/or implementation.

~~Works with the SWCD Finance Committee in drafting annual program budget, prepares grant applications and other funding proposals, and serves as the day to day manager/administrator for all district conservation program grants.~~ Assures all funds received are disbursed according to State Board of Accounts guidelines.

Develops and prepares newsletters, press releases, and printed materials.

Develops and implements field days and workshops as needed in coordination with the Monroe County Conservation Team, specifically supporting farmers and local and state organizations with field days associated with grants.

Advises land users about programs available to provide technical and financial assistance for applying conservation practices on their land.

~~Manages field offices, and oversees~~ **Supervises** other ~~District~~ **MCSWCD** employees, including recommending training, disciplinary action, and recognizing employee efforts as required.

~~Provides soil, water, and related natural resource information, educational resources, programs, and training to local schools, Teachers, Educators and Landowners in cooperation with other Monroe County Departments, Groups and Agencies, including but not limited to, field day workshops and educational events for both youth and adults.~~

Organizes, **assists**, attends, and/or presents at ~~a variety of monthly Board~~ **various** meetings, including, but not limited to **MCSWCD BOARD, County Council, Board of Commissioners, SWEET, McIRIS, Urban Soil Health, CCSI, Regional SWCD, Watershed groups, MCSWCD Annual Meeting, and Indiana Association of Soil and Water Conservation District Annual Conference.** ~~Watershed Planning, and assists others in planning and conducting monthly board meetings, and the SWCD's annual meeting.~~

Develops, conducts, or participates in surveys, studies, or investigations of various land uses to inform corrective action plans., ~~g~~ **Gathers** ~~ing~~ information ~~from~~ **from** geographic information systems databases ~~or applications to~~ **and to** formulate land use recommendations.

Assists **MCSWCD** Board of Supervisors in developing 3-5 year business/**long range** plans, annual plans of action, and ~~publishing~~ **providing** required reports for Local, State, and Federal Governments.

~~Serves as SWCD Financial Officer, including maintaining records of financial accounts and providing monthly and annual reports, collecting outstanding debits, making bank deposits, and writing checks and filing all SBOA reports monthly and annually.~~

Performs administrative duties, including but not limited to, maintaining office inventory of supplies and publications, receiving, screening, and distributing incoming and outgoing mail, answering telephones, greeting office visitors, determin**ing** e nature of calls or visits needed, assisting patrons with questions,

providing information, and/or routing calls to appropriate individuals or agencies, typing departmental correspondence, maintaining files and records, performing computer system back-up, ~~providing computer training,~~ **security updates**, and maintaining SWCD website and all forms of Social Media for the SWCD.

Performs related duties as assigned.

I. JOB REQUIREMENTS:

Bachelor's Degree **in agricultural field, natural resources, environmental science, or related field** preferred or a minimum of 5 years of **extensive direct** working experience in the field of agriculture, natural resources, or ~~related field~~ **conservation**.

Must be at least 21 years of age.

Thorough knowledge of practices and procedures of bookkeeping and State Board of Accounts, and ability to perform arithmetic calculations and accurately maintain department financial accounts and reports.

Working knowledge in collecting scientific or technical data, collecting statistical data, and analyzing information and evaluating results to choose the best solution to solve a problem.

Working knowledge of standard office procedures and routines and ability to apply such knowledge to a variety of interrelated tasks, process, and operations.

Working knowledge of standard English grammar, spelling, and punctuation, and ability to prepare correspondence and written reports as required.

Knowledge of local, state, and federal conservation laws and guidelines that are applicable to the district.

Ability to develop specific goals and plans, prioritize, organize, and meet deadlines without direct supervision.

Ability to organize and supervise group programs, and plan and deliver effective presentations and educational programs.

Ability to compare or observe similarities and differences between data, people, or things.

Ability to compile, collate, and classify data and make determinations.

Ability to operate standard office equipment, such as computer, calculator, fax machine, postage meter, copier, switchboard, telephone, vehicle, and map software.

Ability to provide public access to or maintain confidentiality of department information and records according to State requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, governmental agencies, school personnel, other Soil and Water Conservation Districts throughout the State, and the general public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work evenings and travel out of town for meetings and presentations, sometimes overnight.

II. DIFFICULTY OF WORK:

Incumbent's duties are broad in scope **and impact. of substantial intricacy involving many variable or considerations with interrelationships difficult to ascertain, and usually having conflicting aspects requiring individual and differential diagnosis and treatment.** Incumbent operates within well-defined guidelines and rules **applicable to specific tasks. Incumbent, and exercises independent judgement in administering departmental operations, developing, presenting, and coordinating conservation programs designed to promote the goals and objectives of the MCSWCD. discretion in selecting the appropriate ones to ensure proper completion of assigned tasks.**

III. RESPONSIBILITY:

Incumbent is responsible for proper completion of assigned tasks where desired results are clearly indicated. Incumbent exercises independent judgment in a variety of situations and circumstances, using **MCSWCD policy and Monroe County Government as guidance for decisions. departmental policies for guidance.** Unusual problems or situations are discussed with the **MCSWCD** Board of Supervisors Chair, and work **product performance** is periodically **and annually** reviewed for soundness of judgment and conclusions, and overall adherence with departmental policies.

IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, ~~other~~ County departments, governmental agencies, school personnel, other Soil and Water Conservation Districts throughout the State, and the general public for purposes of exchanging information and providing education.

Incumbent reports directly to **MCSWCD** Board of Supervisors.

V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in a standard office environment, involving sitting and walking at will, lifting/carrying objects weighing up to 50 pounds, bending, pushing/pulling objects, crouching/kneeling, reaching, keyboarding, close/far vision, speaking clearly, color/depth perception, hearing sounds/communication, and handling/grasping/fingering objects.

Incumbent is occasionally required to work extended evenings and travel out of town for meetings and presentations, sometimes overnight.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of SWCD District Manager for the Monroe County Commissioners Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

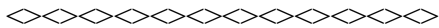
Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes _____ No _____

Applicant/Employee Signature

Date

Type or Print Name



I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

Type or Print Name

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the “Job Classification and Compensation Maintenance Plan” prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Job title MCSWCD District Manager Fund-Account-
Location _____

Department Commissioners/SWCD Date 01/11/2024

☒ Full-time ☐ Part-time ☐ Exempt ☐ Non-exempt

Current Classification PATB Requested Classification PAT

Current pay \$ _____ per _____ Proposed pay \$ _____ per _____

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Martha Miller

TYPE OF ACTION REQUESTED

- ☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

**Questions 1 through 3 to be completed jointly by the employee and/or
Elected Official/Department Head initiating the review**

1. Describe why this new position/added employee/classification review is necessary.

Adding supervisors duties due to the addition of a position.

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☒ yes ☐ no

If yes, describe date and outcome of that request:

In 2014 this position was reclassified from an Administrative Position to a Managerial Position due to significant duties changes.

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and **Strikethrough** for deletions.

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒ yes ☐ no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title District Manager *Classification PAT

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐ yes ☒ no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☒ yes ☐ no If yes, please explain:
The increase of need for on the ground or in the field work was significantly increased.

The current position is not able to sustain the current duties and add the additional work load.

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☒ no If *yes*, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

Providing a one on one, face to face contact with residents/customers aids them in feeling they are being heard

by the county regarding their environment conservation concerns. It service as a positive face for encouraging and promoting conservation at a local level.

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

01/11/2024

Employee signature

Martha Miller

Digitally signed by Martha Miller
DN: cn=Martha Miller, o=Monroe Co Soil & Water Conservation District,
ou, email=mmiller@co.monroe.in.us, c=US
Date: 2024.01.11 10:53:45 -05'00'

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☐ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

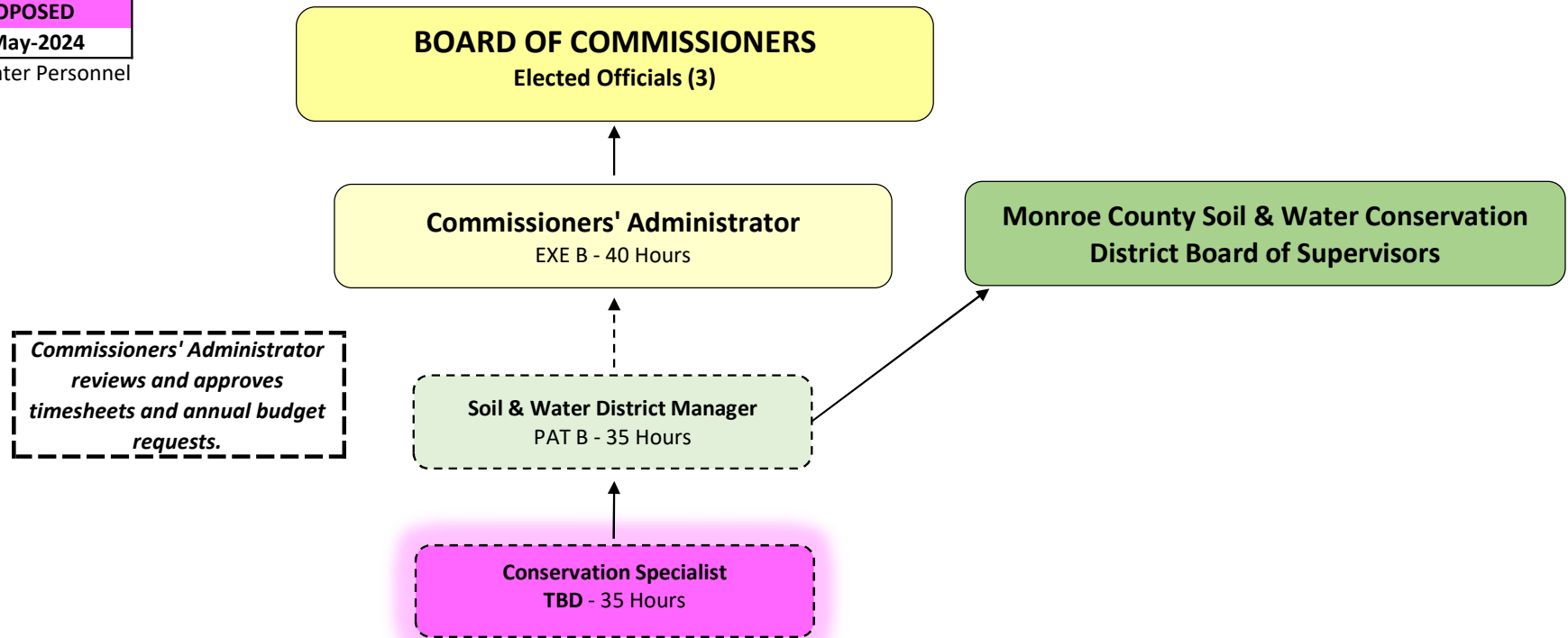
Signature of Elected Official/Department Head

Date

Name typed or printed

PROPOSED
13-May-2024

Soil & Water Personnel





PERSONNEL ADMINISTRATION COMMITTEE AGENDA REQUEST FORM

Forward request and corresponding documentation/information to:

COUNCILREQUESTS@CO.MONROE.IN.US

Contact the Council Office (ext. 7312) prior to submitting your request to obtain all necessary forms required.

Department: Health Presenter: Lori Kelley

REQUESTED Meeting Date: 5/14/2024

PURPOSE: (Prior to completing your request, [review the PAC Policies and Procedures here.](#))



Creation of a New Position

-Include WIS Job Classification Review Form, WIS Employee Job Questionnaire Form, & Word Job Description (if available)



Amend Current Position Description

-Include Red-Lined Job Description & WIS Job Classification Review Form.

NARRATIVE: (Provide a detailed summary explanation for the request.)

The Health Department is requesting restructuring of two divisions including new positions and reporting modifications in order to increase department operating efficiency. These changes will establish a main leader for each division, with a back-up supervisor/lead, to be available to maintain division operations in the absence of the director. Establishing cross-training within each division will increase continuity of operations and is already occurring in many areas of the department.

The creation of two new job descriptions:

- Director of Clinical Services and Case Management
- Vital Records & Administrative Support Assistant Director.

Amend job descriptions of the following positions:

- Health Administrator
- Assistant Registrar
- Clinic Manager
- Clinical Assistant
- Public Health Liaison
- Registrar
- Financial Manager
- Licensed Practical Nurse
- Nurse Practitioner/Advanced Nurse.

Change in reporting structure only:

- Behavioral Health & Wellness Coordinator
- Disease Intervention Specialist-Program Coordinator
- Public Health Emergency Preparedness Assistant
- Public Health Emergency Preparedness Coordinator

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: ~~Clinic Manager~~ **Director of Clinical Services and Case Management**
DEPARTMENT: Health
DIVISION: ~~Futures Family Planning Clinic~~
Division of Clinical Services and Case Management
WORK SCHEDULE: As Assigned
JOB CATEGORY: **COMOT (Computer, Office Machine Operation, Technician) PAT**

DATE WRITTEN: January 2007

STATUS: Full-time

DATE REVISED: January 2011, February 2021 **April 2024**

FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as the Director of Clinical Services and Case Management, responsible for overseeing assigned personnel in the Monroe County Health Department's Division of Clinical Services and Case Management Division, Division of Disease Intervention, and health education and community outreach of the Behavioral Health and Wellness Coordinator. This position will direct and oversee clinical support services for the prevention and treatment of infectious diseases, develop community health education programs, and ensure compliance with required standard operating procedures.

DUTIES:

Directs and oversees the personnel of the Division, including hiring and firing decisions, ensuring compliance with clinical operations, and ensuring quality control standards are in place and met through employee performance. Plans, delegates, and reviews work assignments to ensure clinical and program operations are aligned with federal, state, and local requirements. Reports and collaborates on identified issues with the Health Administrator.

Oversees health education programs conducted by the Behavioral Health and Wellness Coordinator, ensuring program materials are up-to-date and relevant to community needs and core service requirements. Prepares monthly program activity reports and submits to the Health Administrator for review and approval. Collaborates with Health Administrator on identified program issues and for updating programs to enhance service delivery and health outcomes.

Develops and enforces employee schedules, maximizing service availability for patients and ensuring department efficiency. Responsible for approving time off requests and providing backup in the absence of assigned personnel as needed.

Directs assigned personnel pertaining to administrative and clinic operational matters, including human resource needs, interviewing candidates, and orienting new personnel. Collaborates with Health Administrator to address employee work performance issues and necessary corrective instruction.

Serves as the Health Department's HIPAA Privacy Officer, responsible for monitoring compliance and conducting routine trainings for all current and new employees, audits, agreements, investigations, and policy reviews.

Develops and directs the Division's planning process to ensure the Division is ready and compliant with standards necessary for Public Health Accreditation.

Responsible for directing program activities related to accreditation and quality improvement initiatives.

Collects program and clinic data, performs data analysis, and maintains program statistics under the direction of the Health Administrator and Medical Director. Uses data to create reports and visual representations of findings which may be used to develop quality improvement initiatives and submits to Health Administrator monthly.

Directs and oversee the collection of service statistics for the Division, ensuring compliance with all applicable laws and regulations.

Enforces Title X and TANF Clinic regulations, including performing routine quality assurance practices to assess for compliance and make appropriate adjustments as needed.

Oversees medication and supply inventory management. Completes and forwards purchase orders/claims to the Health Administrator for review and approval.

Upon approval from the Health Administrator, responsible for ordering medical supplies and inventory management. Coordinates with the Director of Vital Records and Administrative Support in ordering all other supplies.

Oversees the maintenance of program statistics, evaluations, and related program files. Prepares program activity reports for the Division of Disease Intervention, submitting to the Health Administrator for review and approval.

In collaboration with the Health Administrator, develops interventions to improve health equity in Monroe County.

Serves as liaison to contractors including, but not limited to cleaning and trash services upon approval by the Health Administrator.

Responsible for overseeing and managing the implementation of Path4You Program within the Futures Family Planning Clinic.

Responsible for ensuring telehealth services are provided within the Futures Family Planning Clinic.

Answers questions and provides information to patients and community partners concerning health information and clinic scheduling assistance.

Responsible for developing and implementing quarterly community engagement activities. Conducts public speaking for educational presentations and responds to inquiries from the public.

Maintains patients' rights to privacy and maintains confidential files. Ensures compliance with all applicable Monroe County Health Department policies and procedures, IFHC Standards, HIPPA regulations, and all other federal laws relating to privacy, confidentiality, and service delivery.

Conducts site reviews by regulatory and grant agencies and write reports as needed.

~~Responsible for conducting screening interviews to establish client eligibility and makes referrals to other staff members as necessary. Prepares new client medical records and form packets.~~

~~Responsible for providing referrals to applicable office of health insurance consumer assistance or other appropriate agency regarding patient questions related to insurance coverage and/or plans and enrollment.~~

Oversees and assigns various administrative duties **to personnel**, including entering data into computer, pulling and filing medical records and laboratory reports, preparing department correspondence, opening, sorting, and distributing mail, copying and faxing documents, and maintaining updated electronic client files.

Tabulates ~~Completes and posts~~ daily payments and balances and **reports to Director of Vital Records and Administrative Support and Health Administrator.** Collects and deposits all monies received by clinic into bank account.

Coordinating and establishing Telehealth clinic appointments as required by the granting agency as needed.

Maintains program statistics, evaluations, and related program files. Prepares program activity reports for Title X Clinic requirements, submitting to Health Administrator for review and approval.

Prepares monthly, quarterly, and annual report information, and various other reports and documents as required by the Health Administrator and other governmental and regulating agencies.

Develops and implements clinic outreach activities and educational events in the community.

Responsible for preparing and submitting ~~Prepares and processes~~ patient billing statements, including statements to insurance companies for covered services, such as overseeing Medicaid reimbursement.

Maintains clients' rights to privacy and maintains department's confidential files. Ensures compliance with all applicable Monroe County Health Department policies and procedures, IFHC Standards, HIPAA regulations, and all other federal laws relating to privacy, confidentiality, and service delivery.

Schedules and oversees community engagement ~~Serves as marketing and public relations person,~~ including speaking to social service organizations to ~~market~~ **promote** clinic **services at least quarterly.**

Assists in completing accreditation and quality improvement tasks as needed.

Conducts 2-day site review and writes report.

Oversees office equipment maintenance and service, coordinating equipment repairs as needed. Serves as liaison to contractors including cleaning and trash services **as directed by the Health Administrator.**

In the absence of the Clinic Coordinator and Clinical Assistant, greets clients and answers telephone, responding to inquiries, taking messages, and directing calls to appropriate individual. Conducts reminder calls, as appropriate, to clients for scheduled appointments.

In the absence of the Clinic Coordinator and Clinical Assistant, assists clients, including scheduling appointments, completing forms, providing instruction, and answering questions. Accesses clients' charts for medication refills and responds to phone messages.

Attends educational and training sessions as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

~~Associate's degree with minimum 3-5 years medical office experience, or Bachelor's degree or higher with minimum of 2 years medical office experience. High school diploma or GED with a minimum of 6 years' experience.~~

Master's degree in nursing, epidemiology, or science preferred with five years clinically related experience. Bachelor of Nursing degree from an accredited institution and Indiana license preferred with a minimum of 3 years of experience. CPR mandatory within 30 days of hire.

Working knowledge of and ability to make practical application of public health laws and accepted principles and practices of Public Health Nursing.

Working knowledge of health and social services available to County residents, and ability to coordinate services and facilitate referrals as appropriate.

Ability to supervise assigned staff, including planning/delegating work assignments, making work schedules, ensuring accuracy of clinic functions, training employees, and evaluating performance.

Ability to supervise assigned staff, including planning/delegating work assignments, making work schedules, ensuring accuracy of clinic functions, training employees, and evaluating performance.

Ability to effectively examine and screen individuals, assesses needs, and provides information, counseling, treatment, and referrals as appropriate.

Ability to analyze and evaluate test results, make determinations, and present findings in oral or written form.

Ability to file, post, copy data from one document to another and interview patients to obtain information.

Working knowledge and understanding of Federal Health Insurance Portability and Accountability Act.

Knowledge of department procedures and standard office policies and ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Knowledge of Standard English grammar, spelling, and punctuation with ability to type with speed and accuracy and prepare correspondence accordingly.

Ability to properly operate a variety of standard office equipment, including computer, printer, telephone, fax machine, typewriter, and copier. Ability to operate department computer software programs.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' offices, Bloomington Hospital Laboratory, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and travel out of town for training and meetings.

II. RESPONSIBILITY:

Incumbent performs a variety of standard, administrative duties with work priorities and schedules primarily determined by a formal schedule and supervisor. Assignments and objectives are set jointly by supervisor and incumbent, following standard operating policies and procedures. Periodically, decisions are made in the absence of specific policies and/or guidance from supervisor. Errors in work are primarily detected or prevented through standard bookkeeping checks, supervisory review, and notification from other departments, agencies, and/or the public. Undetected errors could result in loss of time to correct errors and loss of money to the department.

III. PERSONAL WORK RELATIONSHIPS:

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the “Job Classification and Compensation Maintenance Plan” prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Job title Director of Clinical Services & Case Management Fund-Account-Location 1161-TBD
Department Health Date 04/29/2024

☒ Full-time ☐ Part-time ☐ Exempt ☐ Non-exempt

Current Classification _____ Requested Classification _____

Current pay \$ _____ per _____ Proposed pay \$ _____ per _____

Employee(s) in this position: *(attach supplemental sheet if necessary)*

New position proposed

TYPE OF ACTION REQUESTED

☒ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☐ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

To provide division coverage and clinical oversight of multiple health programs

being offered through the health department. To provide managerial oversight and oversee clinical operations.

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐yes ☒no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and **Strikethrough** for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☐yes ☐no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☐yes ☒no If yes, name those job title(s) and classifications:

Job title _____ *Classification _____

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☒yes ☐no
If yes, specify statute citation and/or case:

Somewhat; SB 4

6. Is this request based on increased volume of work? ☒yes ☐no If yes, please explain:

Somewhat; new core service requirements of SB 4

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☒ no If *yes*, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

By ensuring compliance. By providing modifications to department reporting structures and job classification equity

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

VACANT

04/29/2024

Employee signature

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Lori Kelley

04/29/2024

Signature of Elected Official/Department Head

Date

Name typed or printed

Lori Kelley

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: ~~Registrar~~ **Director of Vital Records and Administrative Support**
DEPARTMENT: Health
DIVISION: Vital Records **and Administrative Support**
WORK SCHEDULE: As Assigned
JOB CATEGORY: ~~COMOT-C (Computer, Office Machine Operation, Technician)~~ **PAT**

DATE REVISED: July 2013

DATE REVISED: February 2021, January 2024

STATUS: Full-time

FLSA STATUS: ~~Non-exempt~~
Exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

~~Incumbent serves as Registrar for the Monroe County Health Department, responsible for ensuring proper collection, filing, preservation, and certification of vital records for Monroe County, supervising assigned personnel, providing prompt and accurate service to private individuals seeking vital records and other information, and providing direct support to the public.~~

Incumbent serves as the Director of Vital Records and Administrative Support, in the Monroe County Health Department's Vital Records and Administrative Support Division, responsible for directing and overseeing the Division's programs and services, supervising assigned personnel, planning and delegating work assignments, and leading the Division in accordance with the department's mission and vision.

DUTIES:

~~Supervises~~ **Directs and oversees the personnel of the Division, assigned personnel, including making hiring and termination recommendations, including hiring and firing decisions for assigned personnel, approving time off requests for assigned personnel, interviewing applicants, monitoring employee work performance, and making planning work assignments and including developing and enforcing employee schedules to maximize division performance, ensuring quality control standards are met,** delegating responsibilities, providing training and corrective instruction, and evaluating performance.

Develops and directs the Division's planning process to ensure the division is ready and compliant with standards necessary for Public Health Accreditation.

Directs and oversees the collection of service statistics for the Division, ensuring compliance with all applicable state, federal, and local laws and requirements for Health First Indiana Core Service Requirements, applicable to the Division.

Directs and oversees record retention practices, ensuring compliance with all local, state, and federal laws and regulations. Attends meetings with government agencies to stay informed and disseminate information to assigned personnel.

Directs and leads the division for quality improvement initiatives, program activities, annual goals, strategic planning, and accreditation in collaboration with the Health Administrator.

Responsible for disseminating information from the Health Administrator to assigned personnel on all Health Department changes, including but not limited to, legislative changes affecting public services, services available, vaccine supply, local communicable disease concerns, public health emergencies, family planning services, health education and harm reduction outreach activities, and services being provided through community agreements and/or contracts.

Responsible for directing, developing, and implementing workarounds for the Division when internal and external systems fail for service continuity.

Oversees and maintains all vital records databases to ensure quality assurance of records storage and accurate daily records input. Performs routine audits for quality assurance purposes, forwarding issues to the Health Administrator for collaboration on improvement needs to improve division performance.

Ensures timely implementation of all statute changes and monitors national trends and recommendations for future necessary changes to remain legally compliant.

Monitors, maintains, and implements all internal records management software reporting systems and manages all information for the Division. Manages cash receipts and credit card functions, ensuring timely processing of reports and incoming fees.

Registers and trains new hires for access to receipt program, birth and death systems, and online ordering system. Monitors and instructs new hires on required new hire training and obtaining their notary license. Adds new hire to email distribution lists and enrolls in professional memberships. Approves conference and training requests and forwards for approval. Oversees ~~Vital Records~~ **Vital Records Division** employee timekeeping and notifies Health Administrator of any issues.

Directs and oversees daily operations of the ~~Vital Record~~ Division including **assigning personnel to** answering telephone and receiving office visitors, taking messages, directing callers to appropriate persons or department, and responding to inquires as appropriate, providing international travel information, and tracing genealogical records. Notarizes documents as requested.

Oversees opening and closing procedures, ensuring balances for all receipts with applications are accurate and making daily bank deposits. Collaborates with Financial Manager, to correct any discrepancies in monthly Report of Collections.

Compiles all required data and statistics and prepares a variety of reports as required for daily operations and State/Federal statistical reporting requirements related to Department Vital Records, cause of death data, infant mortality, etc.

Totals and balances daily receipts and prepares bank deposits. Prepares monthly report of collections for fees collected and deposited in general fund as requested.

Receives applications for food licenses, real estate, septic system, pool, trash hauler, campgrounds, and other permits. Collects and receipts fees for permits and files documents accordingly.

Participates in code review process making suggestions to Health Administrator. Follows through on code changes affecting Vital Records and other sections as fee changes warrant. Maintains and updates internal fee collection program with any changes.

Participates in accreditation process and quality improvement projects as assigned.

Serves as a backup to monitor Health Department email inbox, forwarding to appropriate persons.

Prepares, records, and preserves vital records according to Indiana Department of Health (IDOH) guidelines, including ensuring proper processing and filing of all vital records, transferring records and compiling required reports, and working with IDOH personnel/officials to coordinate services and resolve problems with procedures and individual records as required. Oversees records retention for Vital Records according to state guidelines, receiving and fulfilling public records requests for birth and death certificates.

Amends local health records according to state guidelines for amendments by notification, court order, correction affidavits, and adoptions, including locating original records and making appropriate amendments.

Issues certified birth and death certificates as requested, including assisting individuals with completing applications, processing certificates, making and certifying copies, and collecting and receipting payments. Provides Auditor with County death reports. Provides infant mortality report and reports of minor's death to officials.

Assists funeral homes and/or families with processing electronic death records as appropriate, including verifying accuracy of forms, filing, and preparing records for filing with IDOH, preparing indexing accordingly, and providing current information regarding regulations and forms for death records to funeral homes and health care providers.

Assists with preparing and processing new birth records with the state, including receiving birth notifications from hospital, reviewing physician verification, sending, and processing birth record verifications to/from mothers, and forwarding records to state. Updates birth record index accordingly. Prepares amendments to birth records and responds to court orders for birth record changes as needed forwarding appropriate forms to state agency as required.

Serves as backup for the Financial Manager position, including but not limited to preparing and submitting accounts payable claims to Health Administrator and Health Officer for review, and forwarding approved documentation to Auditor's Office for processing. Tracks accounts payable checks accordingly. Prepares bi-weekly departmental payroll and maintains department payroll records and ledgers ensuring appropriate funding sources for payroll, reconciling department ledger totals and submitting to Health Administrator for review and approval. **Serves as backup for the Financial Manager position with grant management and grant invoice processing, forwarding to the Health Administrator for review and submission.**

Composes and prepares a variety of letters, memos, reports, and other correspondence for approval by Health Administrator to be distributed to local, state, and federal agencies as required. Assists with proper retrieval and filing of Vital Records and maintains filing systems accordingly. Updates State Regulations books as assigned.

Works with personnel from Social Security, U.S. Military, FBI, Department of Immigration, U.S. Ambassadors, and a variety of other county and local government departments, social agencies, and professionals to request and/or provide birth/death verifications and related information.

Monitors and replenishes departmental forms and supplies, completing and managing supply orders and coordinating other office needs, forwarding orders for review and approval. Maintains repair/maintenance contracts, orders repairs on office equipment, and recommends renewal of service contracts.

Manages and maintains inventory of Health Department capital assets including assets obtained through grant funds.

Serves as a public health emergency responder, responding to and assisting in resolving public health emergencies, including serving on a 24-hour call for emergencies. Activates Emergency Mass Notification System where assigned.

Participates in accreditation process and quality improvement projects as assigned. Attends education workshops and training seminars as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

A degree in Accounting or Business from an accredited institution with 6 years related experience preferred. Associates Degree in related field or equivalent combination of education and previous work experience in Accounting **required.** Ability to speak additional languages preferred.

Possession of or ability to obtain and maintain possession of an Indiana Notary Public license, National Incident Management System (NIMS) certification, and Indiana Vital Records Association (IVRA) certification. Capstone Certification must be obtained within five (5) years of hire date.

Thorough knowledge of standard policies and practices of Monroe County Health Department, with ability to apply appropriate procedures accordingly.

Thorough knowledge of legal requirements and proper procedures for processing, filing, certifying, and releasing vital records information with ability to assure proper maintenance of department files, and apply and interpret procedures.

Working knowledge of basic bookkeeping, with ability to properly collect and receipt payment, total and balance daily receipts, and prepare bank deposits and various financial reports as needed.

Working knowledge of standard English grammar, spelling, and punctuation, ability to type with speed and accuracy, and ability to use standard office equipment, including department computer software, computer, calculator, printer, postage meter, vehicle, keyboard, telephone, copier, and fax machine.

Ability to accurately prepare, verify and file department information and maintain complete and accurate records as directed.

Ability to use resources, including Indiana Code, Vital Statistics Manual, Monroe County maps, GIS, Indiana Birth Registration System, VitalChek Tutorials, Indiana Death Registration System.

Ability to effectively communicate orally and in writing with co-workers, other county departments, funeral homes, care givers, vendors, various state agencies, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to supervise assigned personnel, including making hiring and termination recommendations, interviewing applicants, monitoring and making work assignments and schedules, delegating responsibilities, providing training and corrective instruction, and evaluating performance.

Ability to provide public access to or maintain confidentiality of department information and records according to state and federal requirements.

Shall comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to compile, collate, and classify data and take action based on data analysis.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in written form.

Ability to occasionally work extended hours travel out of town for training and conferences, sometimes overnight.

Ability to respond swiftly and rationally to emergencies on 24-hour basis.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

II. RESPONSIBILITY:

Incumbent performs regular and recurring registrar duties, exercising judgment in ensuring compliance with record and confidentiality requirements. Incumbent performs duties according to a flexible, customary routine with priorities determined by service needs of the public. Errors in work are generally detected. Undetected errors may result in loss of time for correction and inconvenience to department, other government agencies, and members of general public.

III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other county departments, funeral homes, vendors, various state agencies, and the public for a variety of purposes, including processing permits,

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

- *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Amended: Director of

Vital Records &

Administrative Support

Job title Registrar

Fund-Account-Location 1161 - 10103 - 0000

Department Health

Date 04/23/2024

☒ Full-time ☐ Part-time ☐ Exempt ☐ Non-exempt

Current Classification COMOT C Requested Classification PAT D

Current pay \$ 24.14 per hr Proposed pay \$ 32.29 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Kathy Hertz

TYPE OF ACTION REQUESTED

- ☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

To provide Division oversight for Vital Records and Administrative Support

To provide pay equity across the Health Department

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☒ yes ☐ no

If yes, describe date and outcome of that request:

2023

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and ~~Strikethrough~~ for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒ yes ☐ no

If not, explain why the existing description is no longer accurate:

Does not provide an accurate overview of job responsibilities

Additional responsibilities added

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title Registrar *Classification COMOT C

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☒ yes ☐ no
If yes, specify statute citation and/or case:

SB4

6. Is this request based on increased volume of work? ☒ yes ☐ no If yes, please explain:

In part; additional legislative requirements and oversight

Delegated duties from Health Administrator

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☒ no If *yes*, please describe, including estimated costs:


8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

To ensure compliance with SB4 legal requirements
To provide pay equity

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.


Employee signature

04/23/2024

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.


Signature of Elected Official/Department Head

04/23/2024

Date

Name typed or printed

Lori Kelley

Date 4/23/2024

Employee Job Questionnaire

COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title: Director of Vital Records & Administrative Support

Department: Health

Employee Name: Kathy Hertz

FLSA Status: ☒ Exempt ☐ Non-exempt

• Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

• Instructions •

1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.
4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

DO NOT DETACH THIS INSTRUCTION SHEET

Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does NOT involve performance evaluations of individuals. We aren't collecting information about how you perform, only what you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner, Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is not a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands the essential functions and the skills necessary to perform the job.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

- You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "*Maintains statistics on computer for Indiana Department of Environmental Management (IDEM).*"
- Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms.*"
- Are **machines, equipment, or special tools** involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

Section I

Essential Functions of Position

1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Directs and oversees the Division's programs and services, leading the Division in accordance with the department's mission and vision

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

If Duties Section of your existing job description is accurate please note "see existing description" and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
<i>Supervise subordinate personnel</i>	<u>B</u>	<u>G</u>
<u>ESSENTIALITY</u>	<u>FREQUENCY</u>	
A= Marginal function of the job	C= Perform annually at a minimum	
B= Essential function of the job	D= Perform quarterly at a minimum	
	E= Perform monthly at a minimum	
	F= Perform weekly at a minimum	
	G= Perform on regular (daily) basis	

List Primary Duties:

1. Directs and oversees the personnel of the Division

Essen Freq

B ▼ G ▼

2. Conducts hiring and firing, approving time off requests for assignment personnel, monitoring employee work performance, and planning work assignments

B ▼ G ▼

3. Oversees quality control standards and provides training and corrective instruction as necessary to improve Division performance B G
4. Develops and directs the Divisions planning process to ensure the division is ready and compliant with standards necessary for Public Health Accreditation. B F
5. Directs and oversees the collection of service statistics for the Division, ensuring compliance with all applicable state, federal, and local laws and requirements for Health First Indiana Core Service Requirements, applicable to the Division. B G
6. Directs and oversees record retention practices, ensuring compliance with all local, state, and federal laws and regulations. B G
7. Responsible for directing, developing, and implementing workarounds for the Division when internal and external systems fail for service continuity. B F
8. Ensures timely implementation of all statute changes and monitors national trends and recommendations for future necessary changes to remain legally compliant. B E
9. Performs routine audits for quality assurance purposes, forwarding issues to the Health Administrator for collaboration on improvement needs to improve division performance. B F

10. Responsible for disseminating information from the Health Administrator to assigned personnel on all Health Department changes B F
11. Monitors, maintains, and implements all internal records management software reporting systems and manages all information for the Division. B F
12. Oversees and maintains all vital records databases to ensure quality assurance of records storage and accurate daily records input. B G
13. Registers and trains new hires for access to receipt program, birth and death systems, and online ordering system. B D
14. Oversees opening and closing procedures, ensuring balances for all receipts with applications are accurate and making daily bank deposits. B G

Section II

Job Requirements/Training/Certification

1. Check level of formal education that is required for your position. When specifying college degrees, please identify acceptable fields of study.

☐ High school diploma/GED ☐ Associate Degree ☐ Baccalaureate Degree ☐ Masters Degree

☒ Other (Please describe): A degree (associate, baccalaureate, or masters) with related experience

Acceptable fields of study: accounting or business

2. Specialized training, certification, and/or specific experience required for your position (such as Certified Public Accountant).

Capstone Certification, National Incident Management System, Emergency Mass Notification System, Indiana Vital Records Association

3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

ccounting and budgeting, grant management, payroll processing and auditing; biligual preferred; critical thinking and problem solving; responding to emergencies, bookkeeping and preparing financial reports; public speaking; drafting policies and procedures

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

professional journals, textbooks, legal codes, and technical manuals

5. Does your position require that you have a valid driver's license? ☒ Yes ☐ No If yes, for which duties?

emergencies; as needed for banking and visits to local organizations

6. Does your position require you to be at least 21 years of age? ☐ Yes ☒ No

7. Does your position require passage of a:

Medical exam? ☐ Yes ☒ No

Drug test? ☒ Yes ☐ No

Psychological exam? ☐ Yes ☒ No

Written exam? ☐ Yes ☒ No

Other tests: background

8. Check and list equipment you operate as a regular part of performing your duties:

☒ Computer ☐ Typewriter ☒ Calculator ☐ Transcriber/dictaphone ☐ Vehicle

☐ Other (Please describe)

9. Your fundamental job duties may involve some relationship between you and data (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that most accurately describe your involvement with data.

☐ Compare or observe similarities and differences between data, people, or things.

☐ Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.

☐ Compile, collate, or classify data.

☐ Analyze, evaluate, observe, diagnose, investigate.

☒ Coordinate, place, make determinations, take action based on data analysis.

☐ Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that most accurately apply to your job responsibilities.

- ☐ Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- ☐ File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- ☐ Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- ☒ Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

Section III

Difficulty of Work/Responsibility

1. Which of the following phrases best describes the type of supervision you receive?

- ☐ **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- ☐ **Assignments and objectives set jointly by immediate supervisor and myself.** Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- ☐ **Indirect or occasional supervision.** Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- ☒ **General supervision.** Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- ☐ **Administrative or advisory direction from a board or CEO.** Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

2. Which of the following phrases best describes the criteria for which your work is reviewed?

Work is reviewed primarily for...

- | | |
|--|--|
| <input type="checkbox"/> Attainment of objectives | <input type="checkbox"/> Appropriate supervision or direction of assigned operations |
| <input type="checkbox"/> Compliance with precedent | <input type="checkbox"/> Adherence to instructions/guidelines <input checked="" type="checkbox"/> Compliance with legal requirements |
| <input type="checkbox"/> Technical accuracy | <input checked="" type="checkbox"/> Compliance with Department policy <input type="checkbox"/> Effect on Department goals/objectives |
| <input type="checkbox"/> Soundness of judgment | <input type="checkbox"/> Other (please describe): <input type="text"/> |

If you checked more than two, please provide explanation:

3. Check one of the following statements that most accurately describes the judgment you use in performing fundamental job duties.

- ☐ Decisions are always determined by specific instructions or existing, well established policies and procedures.
- ☐ On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- ☐ Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- ☐ Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- ☒ Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- ☐ Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

legal code requirements and legal retention practices

5. What programs, persons and/or functions are directly affected by the decisions you make?

The Health Department, Division of Vital Records, the public and peers

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

hiring and firing; Health Administrator can overrule

Section IV

Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Lori Kelley

Title: Health Administrator

2. Complete A) and B) only if you supervise or direct the work of others:

A) List names and position titles of employees you supervise or direct as a regular part of your duties.

Jessica Egan, Tina Burres, Eric Diamond; Assistant Registrar's

Patricia Cullins - Data Specialist Clerk

B) Check which statements most accurately describe your managerial/supervisory responsibilities.

- ☒ Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
- ☐ Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
- ☒ Interview candidates for openings and make hiring recommendations.
- ☐ Make hiring decisions.
- ☒ Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
- ☐ Plan, delegate and control work assignments and special projects to assigned staff.
- ☒ Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
- ☒ Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
- ☐ Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
- ☐ Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
- ☐ Review salaries of assigned staff and recommend changes when warranted.
- ☐ Recommend personnel actions, such as promotions, transfers, demotions.
- ☒ Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
- ☒ Maintain discipline and recommend corrective action as warranted.
- ☒ Communicate and administer personnel programs and procedures for my area in accordance with approved policies.

3. List other departments, agencies, organizations, and others with whom you regularly communicate.

4. Check which statements most accurately describe your contact with employees, customers, governmental officials, or the general public.

- ☐ **Cooperative Work Relationship:** Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
- ☒ **Render Service:** Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
- ☐ **Instruct:** Teach or present subject matter to others through explanation, demonstration and supervised practice.
- ☐ **Negotiate:** Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

- ☐ **Mentor:** Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

Section V

Physical Effort/Work Environment

1. Which of the following best describes your primary working environment?

- ☐ Laboratory ☒ Standard office ☐ Storeroom ☐ Vehicle ☐ Outdoors
☐ Garage/shop ☐ Manufacturing setting ☐ Other (please describe):

If you checked more than one, please provide additional explanation.

2. Which of the following best describes your primary working conditions?

ESSENTIALITY

N/A= Not Applicable to job

A= Marginal requirement of job

B= Essential requirement of job

Essentiality

- work alone with minimum supervision
 work under time pressure
 work on several tasks at the same time
 read/carry out simple written instructions
 apply knowledge of people, locations
 plan and layout assigned work projects
 compute/calculate, such as interest
 count, make simple arithmetic additions/subtractions
 read/interpret detailed prints, sketches, layouts, specifications, maps
 prepare detailed reports, such as financial statements, sales activity, product feasibility
 plan and present public speaking presentations, fund raisers, special events
 sitting & walking at will
 standing/walking for long periods

Essentiality

- work with others in a team environment
 work rapidly for long periods
 understand and carry out oral instructions
 memorize and retain instructions
 present findings in oral or written form
 testify in legal proceedings/court

<input type="checkbox"/> A <input type="checkbox"/> work in extreme hot or cold temperatures	<input type="checkbox"/> work in wet/icy surroundings	
<input type="checkbox"/> A <input type="checkbox"/> respond to emergencies from off-duty status	<input type="checkbox"/> work with or near chemicals (please list)	
<input type="checkbox"/> A <input type="checkbox"/> work near fumes, odors, dust, dirt (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> work in a noisy environment (describe noise source)		
<input type="checkbox"/> A <input type="checkbox"/> work in confined areas (please describe)		
<input type="checkbox"/> A <input type="checkbox"/> wear protective clothing or equipment (please describe)		
<input type="checkbox"/> A <input type="checkbox"/> work in high places, such as ladders, roofs, bucket truck (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> work with or exposed to violent/irate individuals (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> respond to situations involving potential physical harm to self and others (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> lifting under 25 pounds	<input type="checkbox"/> A <input type="checkbox"/> lifting 25 to 50 pounds	<input type="checkbox"/> B <input type="checkbox"/> lifting over 50 pounds
<input type="checkbox"/> B <input type="checkbox"/> pushing/pulling objects	<input type="checkbox"/> B <input type="checkbox"/> carrying objects	<input type="checkbox"/> B <input type="checkbox"/> crouching/kneeling
<input type="checkbox"/> B <input type="checkbox"/> bending at waist	<input type="checkbox"/> B <input type="checkbox"/> reaching	<input type="checkbox"/> A <input type="checkbox"/> driving
<input type="checkbox"/> B <input type="checkbox"/> close vision	<input type="checkbox"/> B <input type="checkbox"/> far vision	<input type="checkbox"/> B <input type="checkbox"/> color perception
<input type="checkbox"/> B <input type="checkbox"/> depth perception	<input type="checkbox"/> B <input type="checkbox"/> speaking clearly	<input type="checkbox"/> B <input type="checkbox"/> hearing sounds/communication
<input type="checkbox"/> B <input type="checkbox"/> handling/grasping objects	<input type="checkbox"/> B <input type="checkbox"/> fingering objects (picking, pinching)	

3. List the three most physically demanding activities you regularly perform in your job.

lifting under 25 pounds
pushing/pulling objects
frequent sitting and standing

4. List the three most emotionally demanding activities you regularly perform in your job.

work with or exposed to violent or irate individuals
respond to situations involving potential harm
working fast under pressure on multiple projects

5. What is your normal work schedule (example, 8 a.m. 4 p.m. M-F)?

8-4p; M-F

6. Are you required to:

	<u>Never</u>	<u>Regularly</u>	<u>Occasionally</u>
a. work extended hours	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
b. work weekends	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

	<u>Never</u>	<u>Regularly</u>	<u>Occasionally</u>
c. work evenings	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
d. travel out of town, but not overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For what purpose?			
<div>training/conferences</div>			
c. travel out of town overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For what purpose?			
<div>training/conferences</div>			
f. respond to emergencies on 24-hr basis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
g. on call on rotation basis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

public facing

8. Is your position politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Section VI

Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type)

Kathy Hertz

Hire date

1/4/2021

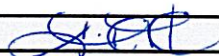
Title

Registrar

Department

Health

Signature



Date

4/23/24

Supervisor: I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Signature

Lori Kelley

Date

4/23/2024

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc.
 118 South Franklin Street
 Muncie, IN 47305
 Phone: (765) 286-5195
 Fax: (765) 286-2824

FLSA EXEMPT/NON-EXEMPT COMPLIANCE QUESTIONNAIRE

NAME Kathy Hertz
JOB TITLE Registrar (Director of Vital Records & Admin Support)
DEPARTMENT Health Department
DATE 4/23/24

This questionnaire is designed to assist in determining your "exempt" or "non-exempt" status under the Fair Labor Standards Act (FLSA). Please answer the following questions. If a particular question does not apply to you, please circle or insert "NA" to indicate "Not Applicable."

1. Is your position classified as Exempt or Non-exempt according to FLSA standards for overtime purposes?

Exempt ☐ Non-exempt ☒ don't know (Please circle the appropriate response)

2. Are you paid a salary or an hourly wage?

Salary ☐ Hourly ☒ (Please circle the appropriate response)

3. Are you currently receiving overtime compensation for hours worked over 40 in a work week?

Yes ☐ No ☒ (Please circle the appropriate response)

4. Are you currently receiving compensatory time for hours work over 40 in a work week?

Yes ☒ No ☐ (Please circle the appropriate response)

5. If you receive compensatory time, do you receive compensation at the rate of one and one-half (1 ½) times for all hours worked over 40 hours in a work week?

Yes ☒ No ☐ (Please circle the appropriate response)

6. Is your *primary* duty managing a recognized department or subdivision?

Yes ☒ No ☐ (Please circle the appropriate response)

7. If you answered "Yes" to question 6, what percentage of your work time is spent engaged in duties that are *not* directly related to managing your department or subdivision (such as performing similar duties to subordinates or standard duties that are non-policy making or non-supervisory?) (Please circle the appropriate response)

NA 5% 10% 15% ☒ 20% 25% 30% 35% 40% 45% 50%
55% 60% 65% 70% 75% 80% 85% 90% 95% 100%

8. Do you interview, select, and hire employees?

☒ Yes No (Please circle the appropriate response)

9. Do you interview and make recommendations for hiring new employees?

☒ Yes No (Please circle the appropriate response)

10. Do you recommend compensation levels and/or hours worked for employees?

☒ Yes No (Please circle the appropriate response)

11. Do you evaluate employees for purposes of recommendations on promotions or other changes in status?

☒ Yes No (Please circle the appropriate response)

12. Do you assign work to employees?

☒ Yes No (Please circle the appropriate response)

13. Do you resolve employee complaints, grievances, and disciplinary matters?

☒ Yes No (Please circle the appropriate response)

14. Do you determine materials and supplies to be used as well as control the distribution of materials and supplies in your workplace?

☒ Yes No (Please circle the appropriate response)

15. Please list the three (3) job duties that require the greatest percentage of your time?

Duty: <u>Overseeing and directing daily employee compliance</u>	Percentage of time: <u>50%</u>
Duty: <u>Developing and enforcing work schedules to maximize efficiency</u>	Percentage of time: <u>10%</u>
Duty: <u>Evaluating employee performance and providing coaching/feedback</u>	Percentage of time: <u>20%</u>

16. Does your position require a baccalaureate degree or advanced degree (such as masters degree, law degree, or doctorate)?

Yes ☒ No (Please circle the appropriate response)

17. Please list the type of degree or degrees required, if applicable:

18. Please list an example or examples of how you directly apply your degree or degrees to perform your position, if applicable:

19. If your position requires a baccalaureate degree or advanced degree (such as masters degree, law degree, or doctorate), what percentage of your work time is spent engaged in duties that are not directly related to using the knowledge obtained from such a degree? (Please circle the appropriate response)

NA 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%
55% 60% 65% 70% 75% 80% 85% 90% 95% 100%

20. Please list the number of employees you supervise by job titles and indicate full-time or part-time status:

3 FT Assitant Registrars	
1 PT Data Clerk	

21. Of those employees listed in question 20, do you have the authority to discipline and terminate?

☒ Yes No (Please circle the appropriate response)

22. Does your position allow you to make independent policy decisions, free from immediate supervision, regarding matters of significant importance to your employer?

☒ Yes No (Please circle the appropriate response)

23. Please list an example or examples of the highest level policy decision you are authorized to make:

- Who is able to obtain vital records & what is required to do so, while following Indiana Code
- How payment are collected, recorded, and deposited.
- How Vital Records are kept, stored, and maintained, while following Indiana records retention laws & guidelines.

24. Please list an example or examples of the highest level budgetary decision you are authorized to make:

All general office supplies for the department & my division as well as specialized supplies & forms for my division.

25. What is the annual budget for your department or subdivision?

\$8000.00

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Health Administrator
DEPARTMENT: Health
DIVISION: Administration
WORK SCHEDULE: As Assigned
JOB CATEGORY: EXE A (*Executive*)

DATE WRITTEN: January 2007
DATE REVISED: February 2021, January 2024

STATUS: Full-time
FLSA STATUS: Exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Health Administrator for the Monroe County Health Department, ~~responsible for supervising Health Department personnel, maintaining and directing daily operations, and recommending and administering policies/programs on approval of Health Officer and Board.~~ **Directing and overseeing the functions and daily operations of the department, directing and overseeing compliance and enforcement with duties as outlined in IC 16-20-8, leading the department according to the department's mission and vision, and directing the administration of public health policies and programs.**

DUTIES:

Directs and enforces all statutory requirements set forth by local, state, and federal law for local health departments, enforces standards for resolution on identified issues relating to public health concerns, emergencies, or violations.

Directs, enforces, and oversees public health matters of Monroe County and ensures proper planning, development, and coordination of all Health Department operations and activities accordingly. Ensures county citizens are provided with public health services in accordance with needs and state core service requirements, along with professionally recognized standards, practices, and legal requirements.

Administers department activities to effectively and efficiently provide Monroe County citizens with public health services in accordance with professionally recognized standards/practices.

~~Develops and implements~~ **Develops, directs, and oversees** programs and plans consistent with the Health Department strategic goals and objectives as approved by the Board of Health. Ensures strategic goals align with accreditation process. Collaborates with local, state, and federal services to maximize programs/services including identifying programs that can be funded and sustained over time.

Represents the Department to the public, including responding to complaints and inquiries, attending meetings and conferences with Indiana Department of Health (IDOH) other government/County agencies, and coordinating and/or resolving problems with services, responding to assistance needs, and providing information upon request.

~~Directs and oversees daily operations~~ and enforces standards for the Divisions of Vital Records and Administrative Support, Clinical Services and Case Management, Public Health Preparedness, Population Health and Outreach, and Environmental Health Services ensuring compliance with program administration, legislative requirements, new hire documentation, delegating, and tracking work assignments and reassigning staff as necessary to continue essential functions of the department.

Oversees the operations, including but not limited to personnel and contracted vendors, to ensure compliance with applicable law and grant requirements for the Monroe County Public Health Clinic and School Liaison. Collaborates with necessary individuals to remedy any identified issues.

Directs and enforces departmental requirements to ensure compliance with accreditation. Assigns and directs quality improvement systems when issues are identified.

Directs the assessment and monitoring of health equity in Monroe County, collaborating with a diverse constituency of community partners to develop and promote health policies aligned with equity and justice.

Releases to the public information statements regarding major health threats. **Collaborates with the Health Officer and Board of Health Chairperson, when necessary, on external communications regarding communicable disease threats.** Works with external stakeholders on public health matters.

Serves as the department's public health spokesperson, approving public information/educational releases related to public health.

Stays up-to-date of relevant health issues in the state and county, reporting findings, offering recommendations, and disseminating via various avenues.

~~Performs and facilitates all~~ **Directs and oversees Department** employee human relations functions including overseeing hiring process including but not limited to, advertising vacancies, conducting pre-employment screenings, and ~~making hiring recommendations.~~ **Ensures compliance with all local, state and federal laws and regulations.** Approves vacations, absences, and travel requests for department personnel **as submitted by division directors.**

~~department personnel, including interns/externs as necessary, providing and tracking initial orientation/training, ensuring new hire documents are completed, tracking and delegating work assignment and reassigning staff as necessary to continue essential functions of the department.~~

Develops and implements Immersive Public Health Externship programming within the Health Department, utilizing Indiana Department of Health and Indiana University School of Medicine guidelines, generating reports and documentation for program as directed.

Conducts work performance evaluations including formation of individual development plans and providing corrective instruction in consideration and compliance with department's strategic plan.

Reviews departmental job descriptions and responsibilities, departmental organizational charts and makes recommendations to Health Officer and Board of Health for changes to ensure efficiency of operations. Submits approved changes to respective County governmental body/committee for final consideration.

Conducts regular meetings with staff to review department operations and share professional information as appropriate.

Coordinates with County Legal to monitor changes in laws, legal requirements, and services in other department/agencies affecting Health Department operations.

Works with Health Officer and Board of Health to effectively assess operations and develop, revise, and implement new policies, procedures, and/or ordinances accordingly.

~~Collaborates with Financial Manager in preparing~~ **Directs, oversees, and completes processes for completion of** annual county departmental budgets and grant budgets and presents to Health Officer and Board of Health for approval. Presents approved budget requests to County Council for final review and approval and responds to inquiries as needed.

Prepares State budgets and any required documentation for review and approval of Health Officer and Board of Health. Submits budgets and documentation to State agencies.

Oversees approved budget for accuracy and compliance including reviewing and approving all department accounts payable claims, Worker's Compensation Claims, FMLA Claims, line-item transfers, payroll, longevity payments, step-increases, and grant reimbursement invoices.

Directs preparation of budgetary and fiscal reports/requests including additional appropriations and changes in salary ordinance. Present recommendations based on reports/requests to Board of Health and directs Financial Manager to submit approved changes for County Council consideration and approval.

Directs or coordinates with Financial Manager and/or Registrar to obtain price quotes and vendor documentation, approving all departmental purchase requests.

Creates schedule for financial reviews of deposits and bank statements ensuring implementation of schedule by Financial Manager.

Establishes and maintains Vendor relationships with regards to setting up business accounts for departmental use.

Directs personnel to ensure proper maintenance and filing of all Department records, including but not limited to reviewing Environmental inspection/investigation complaints, developing resource files, and overseeing Registrar's vital records are filed timely.

~~Collaborates with staff on preparing a variety~~ **Directs staff in the preparation** of monthly, quarterly, and annual reports including grant funds, as required by State Board of Health, County Health Board, and other government and regulating agencies.

Ensures department compliance with all requirements and obligations of County PCB Consent Decree, including conducting and analyzing field tests, investigating, recommending, and implementing

effective solutions to PCB contamination, maintaining PCB resource information files, communication and negotiating with Environmental Protection Agency (EPA) officials, and compiling and submitting all reports and documents as required.

Reviews fiscal projections and recommendations of Financial Manager regarding funding/program opportunities, including user fees, service charges, corporate sponsorships, and grants developing report with proposed changes to present to Health Officer and/or Board of Health for approval, and implementing approved changes as directed.

Creates and writes grant applications based on identified needs to obtain new program funding as appropriate for department goals and responsibilities. Oversees department's compliance of guidelines and requirements for grant funding including but not limited to reviewing and approving required reports and reapplications. Maintains communications with funding agencies as needed.

Provides leadership support for quality improvement, performance management, and workforce development, and all related accreditation activities ensuring department compliance with accrediting processes and licensing requirements.

Serves as a public health emergency responder, responding to and assisting in resolving public health emergencies, including serving on a 24-hour call for emergencies.

Attends professional education workshops and training seminars as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS:

Master's Degree and/or equivalent experience in Public Health, Public Administration, or related field. Possession of or ability to obtain certification as a registered Environmental Health Specialist in the State of Indiana.

Possession of National Incident Management System (NIMS) certification.

Thorough knowledge of standard principles and practices of public health/environmental sanitation, with ability to effectively administer Department operations and develop/implement Department policies and procedures accordingly.

Thorough knowledge of federal, state, and local laws and regulations governing Health Department operations, with ability to effectively monitor operations, maintain records and files, and draft ordinances and department policies to assure compliance with all legal requirements.

Working knowledge of County and department budget processes and ability to properly prepare and administer department budget, including ability to effectively obtain and retain special program funding, write grants, compile required reports, and ensure compliance with grant/funding requirements.

Working knowledge of Standard English grammar, spelling, and punctuation and ability to use standard office equipment, including computer, keyboard, and telephone, copier, and fax machine.

Ability to effectively communicate orally and in writing with co-workers, other County departments, Indiana Department of Health (IDOH), and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to direct and oversee daily operations of department personnel, including providing and tracking initial orientation/training, tracking and delegating work assignments, and reassigning staff.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Shall comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in written form.

Ability to respond to swiftly and rationally to emergencies on 24-hour basis.

Ability to occasionally work evenings and extended hours and travel out of town for training, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

II. DIFFICULTY OF WORK:

Incumbent administers Health Department operations in accordance with generally applicable procedures and legal guidelines and requirements, exercising judgment to effectively supervise personnel, assess and improve department operations, respond to complaints, and ensure compliance with legal requirements. Incumbent's work includes both administrative and investigation/enforcement duties, involving a wide variety of different, individual situations and requiring careful consideration of complex circumstances and variables.

III. RESPONSIBILITY:

Incumbent makes a significant contribution to the outcomes of the department. Goals and general objectives of Incumbent's work are known, with highly unusual problems and/or sensitive problems reviewed with Health Officer and Board as needed. Work is reviewed for soundness of judgment, compliance with Department policies and legal requirements, and continuing quality of Health Department services for Monroe County.

IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other County departments, Indiana Department of Health (IDOH), and the public for purposes of responding to complaints, ensuring compliance with laws and requirements, disseminating public health information, developing services, and supervising personnel.

Incumbent reports directly to Health Officer.

V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in a standard office environment, including sitting/walking at will, lifting/carrying objects weighing up to 50 pounds, bending/crouching/kneeling, reaching, close/far vision, color/depth perception, hearing sounds/communication, and handling/grasping/fingering objects. Incumbent may be exposed to normal hazards associated with investigations of food borne illness for which safety precautions must be followed at all times. Incumbent may be exposed to potentially irate/hostile individuals.

Incumbent occasionally works evenings and extended hours and travels out of town for training, sometimes overnight. Incumbent periodically responds to emergencies on a 24-hour basis.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Health Administrator for the Monroe County Health Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes No

Applicant/Employee Signature

Date

Type or Print Name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

Type or Print Name

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

- **Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR**

Job title Health Administrator Fund-Account-Location 1161-10102-0000

Department Health Date 4/25/2024

☒ Full-time ☐ Part-time ☒ Exempt ☐ Non-exempt

Current Classification EXE-A Requested Classification EXE-B

Current pay \$ 36.98 per hr Proposed pay \$ 42.97 per hr

Employee(s) in this position: (attach supplemental sheet if necessary)

Lori R. Kenoy

TYPE OF ACTION REQUESTED

- ☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other Please describe:

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.
To provide pay rates & equivalent to job
Duty Requirements
To ensure job description & salary outcomes are

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☒ yes ☐ no

If yes, describe date and outcome of that request:

2023 NO RECLASSIFICATION

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and ~~Strikethrough~~ for deletions.

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒ yes ☐ no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title Health Administrator *Classification EXE A

Job title _____ *Classification _____

Job title _____ *Classification _____

* Current classification of position may be impacted by the creation of or reclassification of another position.

5. Is this request a result of new legislation, a mandate, or litigation? ☒ yes ☐ no
If yes, specify statute citation and/or case:

SB 4

6. Is this request based on increased volume of work? ☐ yes ☒ no If yes, please explain:

in-part there are additional legislative requirements that require additional training, critical thinking, and enforcement for compliance

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☒ no If *yes*, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

to ensure compliance with legislative requirements
to provide pay equivalent to job requirements & performance
ex. expectations

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

Employee signature

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.

If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Signature of Elected Official/Department Head

Date

Name typed or printed

Philip CLARK BRETTAN
Philip CLARK BRETTAN DD Health Officer

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Assistant Registrar
DEPARTMENT: Health
DIVISION: Vital Records **and Administrative Support**
WORK SCHEDULE: As Assigned
JOB CATEGORY: ~~COMOT B (Computer, Office Machine Operation, Technician)~~ **PAT**

DATE WRITTEN: July 2013 **STATUS:** Full-time
DATE REVISED: February 2021, January 2024, **April 2024** **FLSA STATUS:** Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Assistant Registrar for the Monroe County Health Department's **Vital Records and Administrative Support Division**, responsible for ~~assisting the Registrar with~~ collecting, filing, preserving, and certifying vital records for Monroe County.

DUTIES:

Receives and fulfills public records requests for birth and death certificates including assisting individuals with completing applications, printing certificates, making, and certifying copies, and collecting and receipting payments as directed.

~~Assists~~ **Responsible for directing and ensuring compliance of** funeral homes and families with processing death records including verifying accuracy of forms, filing, and preparing records for filing with Indiana Department of Health (IDOH). Affirms, registers, logs, and files daily death records, supplies, logs, and tracks Burial Transit Permits and maintains records. Completes and submits required reports such as death statistics, monthly county death, substance abuse, and suicide reports, coroner cases, minor deaths, and fetal death reports, marking birth records as deceases as required, and preparing indexing.

~~Assists~~ **Responsible for directing and ensuring compliance of** with processing new birth records with IDOH, including receiving birth notifications from hospital, reviewing physician verifications, mailing, and processing birth record verifications to/from parents. Registers home births, including assisting parents with completing forms, and updating birth record index.

Conducts project management to provide services effectively and efficiently to the public, reduce department costs, reduce errors and internal risks for legal document development, and improve outcomes by developing solutions and workarounds when internal and external systems fail.

Responsible for effectively communicating information on the basic functions of the following Health Department Divisions: Vital Records and Administrative Support, Disease Intervention, Environmental Health Services, Clinical Services, Case Management & Health Education, Population Health and Outreach, and Public Health Preparedness, to answer inquiries from the public and direct phone calls to the appropriate division.

Stays informed on all Health Department changes, including but not limited to, legislative changes affecting public services, services available, vaccine supply, local communicable disease concerns, public health emergencies, family planning services, health education and harm reduction outreach activities, and services being provided through community agreements and/or contracts.

Creates and enhances database files, researches, and gathers information for monthly and annual statistical reports, and closes year-end reports. Responsible for proper retrieval and filing methods to maintain filing systems and record retention in accordance with local, state, and federal law.

Researches and processes all legal corrections, certifiable facts and changes to County birth and death records. Investigates and verifies authorizations for request of all vital records per state law.

**~~Assists in completing accreditation processes and quality improvement projects as assigned.~~
Completes accreditation processes, program requirements, and quality improvement projects as assigned by the Director.**

Assists **Responsible for directing and ensuring compliance** of personnel from Social Security, US Military, FBI, and other federal, state, and local government agencies, social service agencies, and professionals to request and/or provide birth/death verifications and related information.

Prepares and files paternity affidavits. Answers inquiries regarding birth records registration. Composes and enters data amendments to birth records and responds to court orders for birth record changes as needed, forwarding forms to IDOH as required.

Receives applications for food licenses, real estate, septic system, pool, trash hauler, campgrounds, and other permits. Collecting and receipting fees for permits and birth/death certificates and filing documents accordingly. Totals and balances daily receipts and prepares bank deposits as assigned.

Performs a variety of administrative support duties including sorting and distributing mail, answering telephone and receiving office visitors taking messages, directing callers to appropriate persons or department, notarizing documents, and responding to inquiries including explaining procedures, interpreting ordinances and regulations, providing international travel information, and tracing genealogical records.

Composes and prepares a variety of letters, memos, reports, and other correspondence as directed and assists with proper retrieval and filing of department records maintaining filing system as required.

Assists ~~Registrar~~ **the Director** with monitoring and replenishing departmental forms and supplies.

~~Performs duties of Registrar in their absence.~~

Performs duties of Administrative Assistant in their absence including but not limited to issuing public meeting notices, preparing Board of Health Meeting agenda and packet, and issuing public health department notices as directed.

~~Assists in completing accreditation processes and quality improvement projects as assigned.~~

Attends education workshops and training seminars as required, and assists in training department personnel as assigned.

Performs related duties as assigned.

I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or HSE. Associates Degree with previous related experience preferred.

Possession of or ability to obtain and maintain possession of an Indiana Notary Public license and Indiana Vital Records Association (IVRA) certification.

Working knowledge of and ability to make practical application of state and local rules and regulations and procedures regarding vital records, including receiving, processing, filing, certifying, releasing and reporting information.

Working knowledge of basic bookkeeping, with ability to properly collect and receipt payment, total and balance daily receipts, and prepare bank deposits and various financial reports as needed.

Working knowledge of standard English grammar, spelling, and punctuation, ability to type with speed and accuracy, and ability to use standard office equipment, including department computer software, computer, calculator, printer, postage meter, vehicle, keyboard, telephone, copier, laminator, paper cutter, and fax machine.

Ability to effectively communicate orally and in writing with co-workers, other county departments, funeral homes, care givers, various state agencies, IDOH, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to be cross trained to perform duties of department staff as needed.

Ability to provide public access to or maintain confidentiality of department information and records according to state and federal requirements.

Shall comply with all employer and department policies and work rules, including, but not limited to attendance, safety, drug free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in written form.

Ability to occasionally work extended hours and travel out of town for training and conferences, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

II. RESPONSIBILITY:

Incumbent performs a variety of bookkeeping, reception, and clerical duties according to a flexible, customary routine with priorities determined by supervisor and service needs of the public. Errors are prevented through legally defined procedures and are detected through standard bookkeeping checks and/or notification from other departments, agencies, or the public. Undetected errors may result in loss of time to correct error, work delays in other departments/agencies, and/or inconvenience to other agencies or the public.

III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other county departments, funeral homes, various state agencies, IDOH, and the public for the purposes of exchanging information and rendering service.

Incumbent reports directly to ~~Registrar~~. **Director of Vital Records and Administrative Support**

IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in standard office environment, including sitting/walking at will, lifting/carrying objects weighing under 25 pounds, bending, reaching, keyboarding, driving, close/far vision, crouching/kneeling, speaking clearly, hearing sounds/communication, and handling grasping objects.

Incumbent occasionally works extended hours and travels out of town for training and conferences, sometimes overnight.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Assistant Registrar for the Monroe County Health **Department's Vital Records and Administrative Support Division** describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

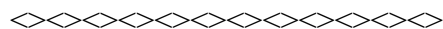
Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes No

Applicant/Employee Signature

Date

Type or Print Name



I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

Type or Print Name

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• **Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR**

Job title Assistant Registrar Fund-Account-Location 1161-10105-0000; 1161-101
Department Health Date 04/23/2024

☒ Full-time ☐ Part-time ☐ Exempt ☐ Non-exempt

Current Classification COMOT B Requested Classification PAT B
Current pay \$ 21.08 per hr Proposed pay \$ 25.99 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Multiple employees; minimum pay rates used; multiple account lines provided

1161-10141-0000; 1161-10104-0000

TYPE OF ACTION REQUESTED

☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

To better align pay with job duties being performed

To provide pay equity across the health department

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☒ yes ☐ no

If yes, describe date and outcome of that request:

2023; no reclassification granted

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and ~~Strikethrough~~ for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒ yes ☐ no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title **Assistant Registrar** *Classification **COMOT B**

Job title **Financial Manager** *Classification **PAT B**

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☒ yes ☐ no
If yes, specify statute citation and/or case:

In part; SB 4

6. Is this request based on increased volume of work? ☒ yes ☐ no If yes, please explain:
In part; Increased complexity; Increased training required to provide backup assistance to financial manager; increased training on state requirements mandatory

7. If you answered yes, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☒ no If yes, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

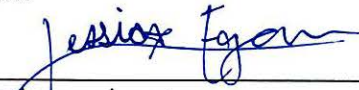
To ensure compliance with SB4 requirements

To provide pay equity across the Health Department

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.



Employee signature

04/23/2024


Date



Employee signature

04/23/2024

Date



Employee signature

04.23.2024

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☐ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.



Signature of Elected Official/Department Head

04/23/2024

Date

Name typed or printed Lori Kelley

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Clinic ~~Manager~~ **Coordinator**
DEPARTMENT: Health
DIVISION: ~~Futures Family Planning Clinic~~
Division of Clinical Services and Case Management
WORK SCHEDULE: As Assigned
JOB CATEGORY: COMOT (Computer, Office Machine Operation, Technician)

DATE WRITTEN: January 2007

STATUS: Full-time

DATE REVISED: January 2011, February 2021

FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Clinic ~~Manager~~ **Coordinator** for the Monroe County Health **Department's** ~~Futures Family Planning Clinic~~ **Clinical Services and Case Management Division**, responsible for providing administrative support **services** for department personnel and assisting clients.

DUTIES:

In the absence of the Director of Clinical Services and Case Management, responsible for ensuring clinic operating hours are being met, with directing clinic personnel and ensuring patient care needs are being met.

Assists the Director with clinic operations to remain in compliance with all grant guidelines including Title X Clinic requirements.

Assists with grant reimbursement claim documents.

Responsible for conducting screening interviews to establish client eligibility and makes referrals to other staff members as necessary. Prepares new client medical records and form packets.

Responsible for providing referrals to applicable office of health insurance consumer assistance and/or other appropriate agency regarding patient questions related to insurance coverage and/or plans and enrollment.

Assists the Director with collecting program and clinic data and maintain program statistics.

Performs various administrative duties, including entering data into computer, pulling, and filing medical records and laboratory reports, preparing department correspondence, opening, sorting, and distributing mail, copying and faxing documents, and maintaining updated electronic client files.

Upon approval from the Health Administrator, assists the Director with ordering medical supplies and inventory management. Coordinates with the Registrar in ordering all other supplies.

Assists with coordinating and establishing Telehealth Clinic Appointments as required by the granting agency, as needed.

Assists with preparing monthly, quarterly, and annual report information, and various other reports and documents as required by the Health Administrator and other governmental and regulating agencies.

In the absence of the Clinical Assistant, greets clients and answers telephone, responding to inquiries, taking messages, and directing calls to appropriate individual. Conducts reminder calls, as appropriate, to clients for scheduled appointments.

Assists clients, including scheduling appointments, completing forms, providing instruction, and answering questions. Accesses clients' charts for medication refills and responds to phone messages.

In the absence of the Director, tabulates ~~Completes and posts~~ daily payments and balances and reports to Registrar and Health Administrator. Collects and deposits all monies received by Clinic into bank account.

Assists the Director in preparing and submitting ~~Prepares and processes~~ patient billing statements, including statements to insurance companies for covered services, such as overseeing Medicaid reimbursement.

Maintains clients' rights to privacy and maintains department's confidential files. Ensures compliance with all applicable Monroe County Health Department policies and procedures, IFHC Standards, HIPAA regulations, and all other federal laws relating to privacy, confidentiality, and service delivery.

Assist in scheduling community engagement, ~~Serves as marketing and public relations person,~~ including speaking to social service organizations to ~~market~~ **promote** clinic **services at least quarterly, as requested by the Director.**

Assists in completing accreditation and quality improvement tasks as needed.

~~Conducts~~ **Assists with** 2-day site review and writes report.

Attends educational and training sessions as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

Associate's degree with minimum 3-5 years medical office experience. Bachelor's degree or higher with minimum of 2 years medical office experience, **preferred**. High school diploma or GED with a minimum of 6 years' experience.

Working knowledge and understanding of Federal Health Insurance Portability and Accountability Act.

Working knowledge of basic bookkeeping, with ability to properly collect and receipt payment, total and balance daily receipts, and prepare bank deposits and various financial reports as needed.

Knowledge of department procedures and standard office policies and ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Knowledge of Standard English grammar, spelling, and punctuation with ability to type with speed and accuracy and prepare correspondence accordingly.

Ability to properly operate a variety of standard office equipment, including computer, printer, telephone, fax machine, typewriter, and copier. Ability to operate department computer software programs.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' offices, Bloomington Hospital Laboratory, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours.

II. RESPONSIBILITY:

Incumbent performs a variety of standard, administrative duties with work priorities and schedules primarily determined by a formal schedule and supervisor. Assignments and objectives are set jointly by supervisor and incumbent, following standard operating policies and procedures. Periodically, decisions are made in the absence of specific policies and/or guidance from supervisor. Errors in work are primarily detected or prevented through standard bookkeeping checks, supervisory review, and notification from other departments, agencies, and/or the public. Undetected errors could result in loss of time to correct errors and loss of money to the department.

III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' offices, Bloomington Hospital Laboratory, and the public for the purposes of exchanging information and responding to inquiries.

Incumbent reports directly to ~~Health Administrator and/or Medical Director.~~ **Director of Clinical Services and Case Management.**

IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in a clinical setting, including sitting and walking at will, sitting for long periods, lifting/carrying objects weighing under 25 pounds, reaching, bending, keyboarding, close/far vision, speaking clearly, hearing sounds/communication, and handling/grasping objects.

Incumbent is occasionally required to work extended hours.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Clinic ~~Manager~~ **Coordinator** for the Monroe County Health **Department's Clinical Services and Case Management Division** describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined?
Yes _____ No _____

Applicant/Employee Signature

Date _____

Type or Print Name _____

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date _____

Type or Print Name _____

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Job title Clinic Coordinator Fund-Account-
Location 8126/8150-10187-9624
Department Health Date 04/30/2024

☒ Full-time ☐ Part-time ☐ Exempt ☒ Non-exempt

Current Classification COMOT C Requested Classification COMOT D

Current pay \$ 22.87 per hr Proposed pay \$ 24.06 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Vacant

TYPE OF ACTION REQUESTED

☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

**Questions 1 through 3 to be completed jointly by the employee and/or
Elected Official/Department Head initiating the review**

1. Describe why this new position/added employee/classification review is necessary.

updating the job description

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐ yes ☒ no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and **Strikethrough** for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒ yes ☐ no

If not, explain why the existing description is no longer accurate:

back up duties

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title Financial Manager *Classification PAT B

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐ yes ☒ no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☐ yes ☒ no If yes, please explain:

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☐ no If *yes*, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

vacant

04/30/2024

Employee signature

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Lori Kelley

04/30/2024

Signature of Elected Official/Department Head

Date

Name typed or printed

Lori Kelley

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Clinical Assistant
DEPARTMENT: Health
DIVISION: ~~Futures Family Planning Clinic~~
Division of Clinical Services and Case Management
WORK SCHEDULE: As Assigned
JOB CATEGORY: COMOT (Computer, Office Machine Operation, Technician)

DATE WRITTEN: May 2021

STATUS: Part-time

DATE REVISED:

FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Clinical Assistant for the Health Department's ~~Family Planning Clinic~~, **Clinical Services and Case Management Division**, responsible for providing patient/client registration, intake, and discharge of clients and general support of clinical services.

DUTIES:

Greets clients and answers telephone, responding to inquiries, taking messages, and directing calls to appropriate individual. Conducts reminder calls, as appropriate, to clients for scheduled appointments.

Assists clients, including scheduling appointments, completing forms, providing instruction, and answering questions. Accesses clients' charts for medication refills and responds to phone messages.

Assists in conducting screening interviews to establish client eligibility and makes referrals to other staff members as necessary. Prepares new client medical records and form packets.

Assists in various administrative duties, including entering data into computer, pulling, and filing medical records and laboratory reports; preparing department correspondence; opening, sorting, and distributing mail; copying and faxing documents; and maintaining updated electronic client files.

~~May~~ **Assists** in tabulating data and preparing monthly, quarterly, and annual reports as requested.

~~May~~ **Assists** in preparation of grant applications for clinic funding.

~~May~~ **Assists the Clinic Coordinator in preparing and submitting patient insurance billing statements, including processing statements to insurance companies for covered services for to ensure Medicaid reimbursement as well as insurance billing. Performs these duties in the absence of the Clinic Coordinator as needed.**

Assists with tabulating daily payments and balances and reports to Director and Health Administrator. Collects and deposits all monies received by clinic into bank account in the absence of the Clinic Coordinator or Director.

In the absence of the Clinic Coordinator, provides referrals to applicable office of health insurance consumer assistance or other appropriate agency regarding patient questions related to insurance coverage and/or plans and enrollment.

Collaborates with the Clinic Coordinator to plan community engagements. Assists in community outreach through public speaking for social service organizations, other requests for education, or at health fairs, and assists in marketing plan development, **as requested.**

Attends educational and training sessions as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Medical office experience and education in public health, reproductive health, or general education preferred. Public speaking skills required.

Knowledge of department procedures and standard office policies, and ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Working knowledge of basic bookkeeping, with ability to properly collect and receipt payment, total and balance daily receipts, and prepare bank deposits and various financial reports as needed.

Knowledge of Standard English grammar, spelling, and punctuation, ability to type with speed and accuracy and prepare correspondence accordingly.

Working knowledge and understanding of Federal Health Insurance Portability and Accountability Act. Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to type with speed and accuracy and properly operate a variety of standard office equipment, including computer, printer, telephone, fax machine, typewriter, and copier. Ability to operate department computer software programs.

Ability to comply with all employer and department policies and work rules, including but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' offices, Bloomington Hospital Laboratory, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions.

Ability to occasionally work extended hours.

II. RESPONSIBILITY

Incumbent performs a variety of duties with work priorities and schedules determined by a formal schedule and supervisor. Assignments and objectives are set jointly by supervisor and incumbent, following standard operating policies and procedures. Periodically, decisions are made in the absence of specific policies and/or guidance from supervisor. Errors in work are primarily detected or prevented through standard bookkeeping checks, supervisory review, and notification from other departments, agencies, and/or the public. Undetected errors could result in loss of time to correct errors and loss of money to the department.

III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' offices, Bloomington Hospital Laboratory, and the public for the purposes of exchanging information and responding to inquiries.

Incumbent reports directly to ~~Clinic Manager~~. **Director of Clinical Services And Case Management**

IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in a clinical setting, including sitting and walking at will sitting for long periods, lifting/carrying objects weighing under 25 pounds, reaching, bending, keyboarding, close/far vision, speaking clearly, hearing sounds/communication, and handling/grasping objects.

Incumbent is occasionally required to work extended hours.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Clinical Assistant for the Monroe County Health **Department's Clinical Services and Case management Division** describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

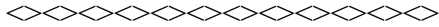
Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes _____ No _____

Applicant/Employee Signature

Date

Type or Print Name



I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

Type or Print Name

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

- *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Job title Clinical Assistant

Fund-Account-Location 8126/8150-17801-9624

Department Health

Date 04/29/2024

☐ Full-time ☒ Part-time ☐ Exempt ☒ Non-exempt

Current Classification part-time

Requested Classification _____

Current pay \$ 20.61 per hr

Proposed pay \$ 20.61 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Debbie Deckard

TYPE OF ACTION REQUESTED

- ☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☐ Reclassification due to change in duties, responsibilities, work conditions, etc.
☒ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

Update job description

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐yes ☒no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and ~~Strikethrough~~ for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒yes ☐no

If not, explain why the existing description is no longer accurate:

Yes; additional duties to provide back-up assistance

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒yes ☐no If yes, name those job title(s) and classifications:

Job title	Clinical Coordinator	*Classification	COMOT C
Job title	Financial Manager	*Classification	PAT B
Job title		*Classification	

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐yes ☒no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☐yes ☒no If yes, please explain:

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☐ no If *yes*, please describe, including estimated costs:


8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

By providing continuity of services in the absence of other employees

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.


Employee signature

04/29/2024

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Lori Kelley

04/29/2024

Signature of Elected Official/Department Head

Date

Name typed or printed Lori Kelley

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: ~~Public Health Liaison~~ **Director of Public Health Preparedness**
DEPARTMENT: Health
DIVISION: **Public Health Preparedness**
WORK SCHEDULE: 8:00 a.m. – 4:00 p.m., M-F
JOB CATEGORY: PAT B (*Professional, Administrative, Technological*)

DATE WRITTEN: October 2023

STATUS: Full-time

DATE REVISED:

FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless those accommodations would present an undue hardship.

~~Incumbent serves as Public Health Liaison for the Monroe County Health Department responsible for providing education and outreach.~~

Incumbent serves as the Director of Public Health Preparedness, responsible for leading the Monroe County Health Department's Public Health Preparedness Division in accordance with the Department's Mission, supervising and directing assigned personnel, leading public health emergency preparedness activities, trainings, and response efforts, directing and overseeing the department's webmaster needs and managing divisional programs and services.

DUTIES:

Directs and oversees assigned personnel of the Division, including hiring and firing personnel, orienting new subordinates, planning, and delegating work assignments, providing training and development, ensuring compliance with divisional goals and quality improvement initiatives, and providing corrective instruction. Reports and collaborates on identified issues with the Health Administrator.

Directs and oversees the Division's outreach on public health emergency and infectious disease education, including public education, school programs, health fairs, and media messaging, and submits reports.

Directs and oversees the Division's ~~with~~ public health emergency planning, including assisting with development of emergency and safety preparedness plans, coordinating, and preparing emergency protocols, responding to public health emergencies, and ensuring compliance with regulations.

Tracks and analyzes public health information, public health threats, emergencies, and infectious disease reports, and monitors active outbreak case numbers, and submits reports **to the Health Administrator on a weekly basis.**

Oversees divisional requirements to ensure compliance with accreditation standards.

Directs and oversees the Department's technology needs, including developing reports and electronic files, directing various technological and/or GIS-related department projects,

developing and implementing training for new employees on uses of technological systems, and overseeing troubleshooting with department software systems.

Responsible for database management and providing project management for Health Department projects including planning and implementation of technological systems and electronic forms.

Responsible for maintaining all Department sponsored webpages, ensuring information is relevant and up to date. Responsible for managing all Department sponsored social media platforms, including but not limited to, providing information on educational materials and community outreach events.

May serve as the Department's Crisis and Risk expert during emergencies, ensuring protocols and response efforts are properly enforced in accordance with local, state, and federal laws.

In collaboration with the Health Administrator, directs, and facilitates the virtual portion of the Board of Health meetings, ensuring compliance with local, state, and federal laws and regulations. Responsible for preparing legal notices and meeting notices for public meetings in accordance with the law and in collaboration with County legal.

Assists with the preparation of meeting agendas, packets, and minutes and provides to Health Administrator for review prior to distribution.

Under the direction of the Health Administrator and when essential, provides external communications to the public regarding public health matters, including but not limited to, emergencies, threats, education, and/or general matters of awareness.

~~Provides, and promotes, outreach on public health emergency and infectious disease education, including public education, school programs, health fairs, and media messaging, and submits reports.~~

~~Tracks and analyzes public health information, public health threats, emergencies, and infectious disease reports, and monitors active outbreak case numbers, and submits reports.~~

~~Assists~~ **Directs and oversees** clinics that serve the public and school populations.

~~Assists with public health emergency planning, including assisting with development of emergency and safety preparedness plans, coordinating, and preparing emergency protocols, responding to public health emergencies, and ensuring compliance with regulations.~~

~~Assists~~ **Directs activities with** community organizations and local schools with emergency response plans and ensures compliance with infection control, communicable disease reporting, and all-hazard responses to health to public health threat plans.

Collaborates with **Public Health Emergency** Preparedness Coordinator, ensuring compliance with established mutual aid agreements with surrounding counties and participating in state-wide public health training programs and exercises.

May serve as media liaison including assisting in distribution of press releases to news media, State agencies, and County departments as directed by the Health Administrator.

Releases for distribution, ordinances, contracts, and resolutions to news media, State agencies, County departments, and for Commissioners' public meetings.

Assists and trains public and private organizations in disaster response protocols. Assists communities affected by natural disasters in finding relief, funding, and assistance.

Collaborates with community partners to ensure fatality prevention initiatives are implemented in the local community. Assists Health Administration with developing equity-focused fatality prevention strategies addressing disparities in maternal and infant mortality.

Collects and compiles data for all department's programs and provides detailed reports.

Maintains up-to-date lists of internal and external contacts and stakeholders, including media and community partner contacts.

~~Assists~~ **Responsible for** ~~with~~ overseeing and ensuring equitable access to vaccines and other medical countermeasures needed in an emergency, **in collaboration with the Health Administrator**

May Will serve as point of contact and liaison between Incident Command Participants.

Serves as liaison between the Department and external agencies.

Assists the Environmental **Health Services** Division with outreach and education on safe private well water quality and best practices.

Performs related duties as assigned.

I. JOB REQUIREMENTS:

Master's degree Preferred. Baccalaureate Degree in related fields of Public Health, Public Policy, Health Science, or Nursing or EMT or LPN certifications.

Ability to meet all hiring and retention requirements, including passage of a drug test and background check.

Possession of or ability to obtain and maintain CPR and Basic Life Support (BLS) certifications.

Working knowledge of and ability to make practical applications of health emergencies, and infectious diseases.

Working knowledge of maternal and infant mortality disparities.

Working knowledge of equity-focused facility prevention strategies.

Working knowledge of basic computer skills including word processing, spreadsheet, email, and Department-specific software applications with ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Working knowledge of standard English grammar, spelling, and punctuation and ability to prepare correspondence and written reports as required.

Ability to properly operate standard office equipment, including computer, telephone, calculator, and printer.

Ability to and knowledge of data collection and clinical care.

Ability to rationally and collected in emergency situations.

Ability to provide public access to or maintain confidentiality of Department information and records according to state requirements including HIPAA regulations.

Ability to comply with all employer and Department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, various organizations, schools, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to compile, collate, and classify data.

Ability to work alone with minimum supervision and with others in a team environment, work on several tasks at the same time, and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written and oral instructions.

Ability to plan and present public speaking presentations.

Ability to plan and layout assigned work projects and apply knowledge of people and locations.

Ability to count, compute, and make arithmetic calculations.

Ability to read and interpret professional journals, infectious disease references, and emergency preparedness manuals.

Ability to testify in legal proceedings and court.

Ability to occasionally work extended hours, evenings, and weekends, and travel out of town for training, sometimes overnight, and occasionally respond to emergencies on 24- hour basis and on call an on-rotation basis.

Possession of a valid driver's license with a demonstrated safe driving record.

II. DIFFICULTY OF WORK:

Incumbent's assignments are guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations.

III. RESPONSIBILITY:

Incumbent is responsible for proper completion of assigned tasks where desired results are clearly indicated. On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from supervisor. Work is reviewed primarily for adherence to instructions and guidelines, compliance with Department policy and legal requirements, technical accuracy, and attainment of goals and objectives.

IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent communication with co-workers, other County departments, various organizations, schools, and the public, for the purposes of exchanging information, instruct, and rendering services.

Incumbent reports directly to Health Administrator.

V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs a variety of duties in a standard office environment including sitting/walking at will, sitting/standing/walking for long periods, lifting/carrying objects weighing over 50 pounds, bending/crouching/kneeling, reaching, pushing/pulling objects, walking on uneven terrain, may work in extreme temperatures, work near fumes, odors, dust, dirt, noisy environment, in confined areas, in high places, close/far vision color/depth perception, hearing sounds/communication, speaking clearly, keyboarding, driving, and handling/grasping/fingering objects. Incumbent may wear proactive clothing or equipment.

Incumbent is occasionally required to work extended hours, evenings, and weekends, and travel out of town for training, sometimes overnight, and occasionally required to respond to emergencies on 24-hour basis and on call an on rotation basis.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of **Director of Public Health Liaison Preparedness** for the Monroe County Health **Department's Public Health Preparedness Division** describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

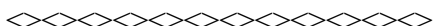
Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes No

Applicant/Employee Signature

Date

Type or Print Name



I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

Type or Print Name

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the “Job Classification and Compensation Maintenance Plan” prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Job title Director of Public Health Preparedness Fund-Account-Location 1161-10183-0000
Department Health Date 04/29/2024

☒ Full-time ☐ Part-time ☐ Exempt ☒ Non-exempt

Current Classification PAT B Requested Classification PAT D

Current pay \$ 25.99 per hr Proposed pay \$ 30.59 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Not currently filled

TYPE OF ACTION REQUESTED

☒ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

To provide a division director of emergency preparedness

To provide additional personnel and division oversight of the division. To fulfill core service requirements

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐yes ☒no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and **Strikethrough** for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒yes ☐no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☐yes ☒no If yes, name those job title(s) and classifications:

Job title _____ *Classification _____

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☒yes ☐no
If yes, specify statute citation and/or case:

SB 4

6. Is this request based on increased volume of work? ☐yes ☒no If yes, please explain:

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☐ no If *yes*, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

By providing additional personnel necessary to oversee and direct the division of emergency preparedness

To provide department equity with positions and division structures

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

04/29/2024

Employee signature

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Lori Kelley

04/29/2024

Signature of Elected Official/Department Head

Date

Name typed or printed

Lori Kelley

Employee Job Questionnaire

COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title: Director of Public Health Preparedness

Department: Health

Employee Name: NA

FLSA Status: ☐ Exempt ☐ Non-exempt

• Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

• Instructions •

1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.
4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

DO NOT DETACH THIS INSTRUCTION SHEET

Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does NOT involve performance evaluations of individuals. We aren't collecting information about how you perform, only what you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner, Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a “snap shot” of the basic functions of a position – it is not a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands the essential functions and the skills necessary to perform the job.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

- You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, “*Maintains statistics on computer for Indiana Department of Environmental Management (IDEM).*”
- Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, “*Complete XQ325 forms*” may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, “*Complete payment assistance application forms.*”
- Are **machines, equipment, or special tools** involved in accomplishing tasks? For example, “*Post payments*” could involve a computer or writing in manual ledgers, and “*Update maps*” could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

Section I

Essential Functions of Position

1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Directing and overseeing assigned personnel, including hiring and firing decisions, orienting new subordinates, and delegating work.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

If Duties Section of your existing job description is accurate please note “see existing description” and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
<i>Supervise subordinate personnel</i>	<u><i>B</i></u>	<u><i>G</i></u>
<u>ESSENTIALITY</u>	<u>FREQUENCY</u>	
A= Marginal function of the job	C= Perform annually at a minimum	
B= Essential function of the job	D= Perform quarterly at a minimum	
	E= Perform monthly at a minimum	
	F= Perform weekly at a minimum	
	G= Perform on regular (daily) basis	

List Primary Duties:

Essen Freq

1. Responsible for leading the Monroe County Health Departments Public Health Preparedness Division in accordance with the Departments Mission

B G

2. Supervising and directing assigned personnel

B G

3. Orienting new subordinates and providing training and development
B E
4. Planning and delegating work assignments, ensuring compliance with divisional goals and quality improvement initiatives.
B G
5. Directing and overseeing the departments webmaster needs and managing the departments technology platforms
B G
6. Directs public health emergency planning, including assisting with developing emergency and safety preparedness plans
B F
7. Tracks and analyzes public health information, public health threats, emergencies, and infectious disease status in the community
B G
8. Oversees divisional requirements to ensure compliance with accreditation standards
B E
9. Provides project management direction for health department projects including planning and implementation of technological systems and electronic forms
B F

10. Directs activities with community organizations and local schools with emergency response plans and ensures compliance with local, state, and federal requirements B E
11. Ensures compliance with established mutual aid agreements with surrounding counties and participates in state-wide public health training exercises B D
12. Assists and trains public and private organizations in disaster response protocols B D
13. Responsible for overseeing and ensuring equitable access to vaccines and other medical countermeasures needed in an emergency B D
14. Serves as a point of contact and liaison between Incident Command Participants B C

Section II

Job Requirements/Training/Certification

1. Check level of formal education that is required for your position. When specifying college degrees, please identify acceptable fields of study.

☐ High school diploma/GED ☐ Associate Degree ☒ Baccalaureate Degree ☐ Masters Degree

☐ Other (Please describe):

Acceptable fields of study:

2. Specialized training, certification, and/or specific experience required for your position (such as Certified Public Accountant).

CPR/BLS
Mental Health and First Aid Training Certificate
Stop the Bleed Certification
National Incident Command Structure Certification

3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Emergency response efforts, grant management, budgeting and recordkeeping, data management, project management

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Reference works, technical manuals, professional journals, and legal codes

5. Does your position require that you have a valid driver's license? ☒ Yes ☐ No **If yes, for which duties?**

6. Does your position require you to be at least 21 years of age? ☐ Yes ☒ No

7. Does your position require passage of a:

Medical exam? ☐ Yes ☒ No

Drug test? ☒ Yes ☐ No

Psychological exam? ☐ Yes ☒ No

Written exam? ☐ Yes ☒ No

Other tests:

8. Check and list equipment you operate as a regular part of performing your duties:

☒ Computer ☐ Typewriter ☒ Calculator ☐ Transcriber/dictaphone ☒ Vehicle

☐ Other (Please describe)

9. Your fundamental job duties may involve some relationship between you and data (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that most accurately describe your involvement with data.

☐ Compare or observe similarities and differences between data, people, or things.

☐ Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.

☐ Compile, collate, or classify data.

☐ Analyze, evaluate, observe, diagnose, investigate.

☒ Coordinate, place, make determinations, take action based on data analysis.

☐ Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that most accurately apply to your job responsibilities.

- ☐ Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- ☐ File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- ☐ Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- ☒ Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

Section III

Difficulty of Work/Responsibility

1. Which of the following phrases best describes the type of supervision you receive?

- ☐ **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- ☐ **Assignments and objectives set jointly by immediate supervisor and myself.** Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- ☐ **Indirect or occasional supervision.** Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- ☒ **General supervision.** Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- ☐ **Administrative or advisory direction from a board or CEO.** Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

2. Which of the following phrases best describes the criteria for which your work is reviewed?

Work is reviewed primarily for...

- | | | |
|--|--|---|
| <input type="checkbox"/> Attainment of objectives | <input type="checkbox"/> Appropriate supervision or direction of assigned operations | |
| <input type="checkbox"/> Compliance with precedent | <input type="checkbox"/> Adherence to instructions/guidelines | <input checked="" type="checkbox"/> Compliance with legal requirements |
| <input type="checkbox"/> Technical accuracy | <input checked="" type="checkbox"/> Compliance with Department policy | <input checked="" type="checkbox"/> Effect on Department goals/objectives |
| <input type="checkbox"/> Soundness of judgment | <input type="checkbox"/> Other (please describe): | <div style="border: 1px solid black; height: 20px; width: 400px;"></div> |

If you checked more than two, please provide explanation:

3. Check one of the following statements that most accurately describes the judgment you use in performing fundamental job duties.

- ☐ Decisions are always determined by specific instructions or existing, well established policies and procedures.
- ☐ On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- ☒ Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- ☐ Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- ☐ Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- ☐ Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

Emergency response plans and protocols; communicable disease investigations

5. What programs, persons and/or functions are directly affected by the decisions you make?

Public Health Emergency Preparedness programs and employees; the public related to public health threats and emergencies

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Hiring and firing; Health Administrator and/or Health Officer can overrules

Section IV

Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Lori Kelley Title: Health Administrator

2. Complete A) and B) only if you supervise or direct the work of others:

A) List names and position titles of employees you supervise or direct as a regular part of your duties.

Public Health Emergency Preparedness Coordinator
Public Health Emergency Preparedness Assistant

B) Check which statements most accurately describe your managerial/supervisory responsibilities.

- ☐ Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
- ☐ Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
- ☒ Interview candidates for openings and make hiring recommendations.
- ☒ Make hiring decisions.
- ☒ Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
- ☒ Plan, delegate and control work assignments and special projects to assigned staff.
- ☒ Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
- ☒ Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
- ☐ Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
- ☒ Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
- ☐ Review salaries of assigned staff and recommend changes when warranted.
- ☒ Recommend personnel actions, such as promotions, transfers, demotions.
- ☒ Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
- ☒ Maintain discipline and recommend corrective action as warranted.
- ☒ Communicate and administer personnel programs and procedures for my area in accordance with approved policies.

3. List other departments, agencies, organizations, and others with whom you regularly communicate.

Local, state, and federal governmental bodies; local schools; community health organizations; nonprofit organizations

4. Check which statements most accurately describe your contact with employees, customers, governmental officials, or the general public.

- ☐ **Cooperative Work Relationship:** Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
- ☐ **Render Service:** Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
- ☒ **Instruct:** Teach or present subject matter to others through explanation, demonstration and supervised practice.
- ☒ **Negotiate:** Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

- ☐ **Mentor:** Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

Section V

Physical Effort/Work Environment

1. Which of the following best describes your primary working environment?

- ☐ Laboratory ☒ Standard office ☐ Storeroom ☐ Vehicle ☐ Outdoors
☐ Garage/shop ☐ Manufacturing setting ☐ Other (please describe):

If you checked more than one, please provide additional explanation.

2. Which of the following best describes your primary working conditions?

ESSENTIALITY

N/A= Not Applicable to job

A= Marginal requirement of job

B= Essential requirement of job

Essentiality

- work alone with minimum supervision
 work under time pressure
 work on several tasks at the same time
 read/carry out simple written instructions
 apply knowledge of people, locations
 plan and layout assigned work projects
 compute/calculate, such as interest
 count, make simple arithmetic additions/subtractions
 read/interpret detailed prints, sketches, layouts, specifications, maps
 prepare detailed reports, such as financial statements, sales activity, product feasibility
 plan and present public speaking presentations, fund raisers, special events
 sitting & walking at will
 standing/walking for long periods

Essentiality

- work with others in a team environment
 work rapidly for long periods
 understand and carry out oral instructions
 memorize and retain instructions
 present findings in oral or written form
 testify in legal proceedings/court
 sitting for long periods
 walking on uneven terrain

<input type="text" value="A"/> <input type="button" value="v"/> work in extreme hot or cold temperatures	<input type="text" value="A"/> <input type="button" value="v"/> work in wet/icy surroundings	
<input type="text" value="A"/> <input type="button" value="v"/> respond to emergencies from off-duty status	<input type="text" value="A"/> <input type="button" value="v"/> work with or near chemicals (please list)	
<input type="text" value="A"/> <input type="button" value="v"/> work near fumes, odors, dust, dirt (please describe)		
<input type="text" value="A"/> <input type="button" value="v"/> work in a noisy environment (describe noise source)		
<input type="text" value="A"/> <input type="button" value="v"/> work in confined areas (please describe)		
<input type="text" value="A"/> <input type="button" value="v"/> wear protective clothing or equipment (please describe)		
<input type="text" value="A"/> <input type="button" value="v"/> work in high places, such as ladders, roofs, bucket truck (please describe)		
<input type="text" value="A"/> <input type="button" value="v"/> work with or exposed to violent/irate individuals (please describe)		
<input type="text" value="A"/> <input type="button" value="v"/> respond to situations involving potential physical harm to self and others (please describe)		
<input type="text" value="B"/> <input type="button" value="v"/> lifting under 25 pounds	<input type="text" value="A"/> <input type="button" value="v"/> lifting 25 to 50 pounds	<input type="text" value="A"/> <input type="button" value="v"/> lifting over 50 pounds
<input type="text" value="B"/> <input type="button" value="v"/> pushing/pulling objects	<input type="text" value="B"/> <input type="button" value="v"/> carrying objects	<input type="text" value="A"/> <input type="button" value="v"/> crouching/kneeling
<input type="text" value="B"/> <input type="button" value="v"/> bending at waist	<input type="text" value="B"/> <input type="button" value="v"/> reaching	<input type="text" value="A"/> <input type="button" value="v"/> driving
<input type="text" value="B"/> <input type="button" value="v"/> close vision	<input type="text" value="B"/> <input type="button" value="v"/> far vision	<input type="text" value="B"/> <input type="button" value="v"/> color perception
<input type="text" value="B"/> <input type="button" value="v"/> depth perception	<input type="text" value="B"/> <input type="button" value="v"/> speaking clearly	<input type="text" value="B"/> <input type="button" value="v"/> hearing sounds/communication
<input type="text" value="B"/> <input type="button" value="v"/> handling/grasping objects	<input type="text" value="B"/> <input type="button" value="v"/> fingering objects (picking, pinching)	

3. List the three most physically demanding activities you regularly perform in your job.

Lifting emergency supplies and equipment
Bending at waist
Carrying objects

4. List the three most emotionally demanding activities you regularly perform in your job.

Present materials to large audiences on emotionally charged topics of disasters and emergencies
Respond to situations involving potential harm
Work with or exposed to violent/irate individuals

5. What is your normal work schedule (example, 8 a.m. 4 p.m. M-F)?

8-4, M-F

6. Are you required to:

- a. work extended hours
- b. work weekends

<u>Never</u>	<u>Regularly</u>	<u>Occasionally</u>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

	<u>Never</u>	<u>Regularly</u>	<u>Occasionally</u>
c. work evenings	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
d. travel out of town, but not overnight	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
For what purpose?			
Training/conferences			
c. travel out of town overnight	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
For what purpose?			
Trainings/Conferences			
f. respond to emergencies on 24-hr basis	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
g. on call on rotation basis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

May serve as liaison in emergencies to provide external communications

8. Is your position politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Section VI

Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Hire date

Title Department

Signature Date

Supervisor: I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Signature Date

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc.
118 South Franklin Street
Muncie, IN 47305
Phone: (765) 286-5195
Fax: (765) 286-2824

FLSA EXEMPT/NON-EXEMPT COMPLIANCE QUESTIONNAIRE

NAME

JOB TITLE

DEPARTMENT

DATE

New Position
Director of Public Health Preparedness
Health
4/29/2024

This questionnaire is designed to assist in determining your "exempt" or "non-exempt" status under the Fair Labor Standards Act (FLSA). Please answer the following questions. If a particular question does not apply to you, please circle or insert "NA" to indicate "Not Applicable."

1. Is your position classified as Exempt or Non-exempt according to FLSA standards for overtime purposes?

Exempt

Non-exempt

don't know (Please circle the appropriate response)

new position proposed

2. Are you paid a salary or an hourly wage?

Salary

Hourly

(Please circle the appropriate response)

Public Health Liaison

3. Are you currently receiving overtime compensation for hours worked over 40 in a work week?

Yes

No

(Please circle the appropriate response)

4. Are you currently receiving compensatory time for hours work over 40 in a work week?

Yes

No

(Please circle the appropriate response)

5. If you receive compensatory time, do you receive compensation at the rate of one and one-half (1 ½) times for all hours worked over 40 hours in a work week?

Yes

No

(Please circle the appropriate response)

6. Is your *primary* duty managing a recognized department or subdivision?

Yes

No

(Please circle the appropriate response)

7. If you answered "Yes" to question 6, what percentage of your work time is spent engaged in duties that are *not* directly related to managing your department or subdivision (such as performing similar duties to subordinates or standard duties that are non-policy making or non-supervisory?) (Please circle the appropriate response)

NA	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%
	55%	60%	65%	70%	75%	80%	85%	90%	95%	100%

8. Do you interview, select, and hire employees?

☒ Yes ☐ No (Please circle the appropriate response)

In collaboration with Health Administrator

9. Do you interview and make recommendations for hiring new employees?

☒ Yes ☐ No (Please circle the appropriate response)

10. Do you recommend compensation levels and/or hours worked for employees?

☒ Yes ☐ No (Please circle the appropriate response)

11. Do you evaluate employees for purposes of recommendations on promotions or other changes in status?

☒ Yes ☐ No (Please circle the appropriate response)

12. Do you assign work to employees?

☒ Yes ☐ No (Please circle the appropriate response)

13. Do you resolve employee complaints, grievances, and disciplinary matters?

☒ Yes ☐ No (Please circle the appropriate response)

14. Do you determine materials and supplies to be used as well as control the distribution of materials and supplies in your workplace?

☒ Yes ☐ No (Please circle the appropriate response)

In the Preparedness Division

15. Please list the three (3) job duties that require the greatest percentage of your time?

Duty: Overseeing personnel Percentage of time: 60

Duty: Training personnel Percentage of time: 20

Duty: Grant management/ compliance Percentage of time: 20

16. Does your position require a baccalaureate degree or advanced degree (such as masters degree, law degree, or doctorate)?

☒ Yes ☐ No (Please circle the appropriate response)

17. Please list the type of degree or degrees required, if applicable:

Public Health Public Policy,
Health Science, nursing,

18. Please list an example or examples of how you directly apply your degree or degrees to perform your position, if applicable:

Directing programs and activities to ensure compliance with infection control, communicable disease reporting, and hazard responses to public health threats.

serves as a crisis and risk expert during emergencies, ensuring efforts are enforced in accordance with local, state, and federal laws

19. If your position requires a baccalaureate degree or advanced degree (such as masters degree, law degree, or doctorate), what percentage of your work time is spent engaged in duties that are not directly related to using the knowledge obtained from such a degree? (Please circle the appropriate response)

NA	5%	<u>10%</u>	15%	20%	25%	30%	35%	40%	45%	50%
	55%	60%	65%	70%	75%	80%	85%	90%	95%	100%

20. Please list the number of employees you supervise by job titles and indicate full-time or part-time status:

Public Health Emergency
Preparedness Coordinator -
full-time

Public Health Emergency
Preparedness Assistant -
part-time

21. Of those employees listed in question 20, do you have the authority to discipline and terminate?

Yes No (Please circle the appropriate response)

discipline & recommend termination

22. Does your position allow you to make independent policy decisions, free from immediate supervision, regarding matters of significant importance to your employer?

Yes No (Please circle the appropriate response)

23. Please list an example or examples of the highest level policy decision you are authorized to make:

Updating emergency operation plans to maintain compliance with local, state, and federal laws

24. Please list an example or examples of the highest level budgetary decision you are authorized to make:

Ordering supplies approved by grant

assisting with grant budget application and tracking division budget expenses

25. What is the annual budget for your department or subdivision?

Division- approximately \$30,000, including a \$25,000 grant

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: ~~Registrar~~ **Director of Vital Records and Administrative Support**
DEPARTMENT: Health
DIVISION: Vital Records **and Administrative Support**
WORK SCHEDULE: As Assigned
JOB CATEGORY: ~~COMOT-C (Computer, Office Machine Operation, Technician)~~ **PAT**

DATE REVISED: July 2013

DATE REVISED: February 2021, January 2024

STATUS: Full-time

FLSA STATUS: ~~Non-exempt~~
Exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

~~Incumbent serves as Registrar for the Monroe County Health Department, responsible for ensuring proper collection, filing, preservation, and certification of vital records for Monroe County, supervising assigned personnel, providing prompt and accurate service to private individuals seeking vital records and other information, and providing direct support to the public.~~

Incumbent serves as the Director of Vital Records and Administrative Support, in the Monroe County Health Department's Vital Records and Administrative Support Division, responsible for directing and overseeing the Division's programs and services, supervising assigned personnel, planning and delegating work assignments, and leading the Division in accordance with the department's mission and vision.

DUTIES:

~~Supervises~~ **Directs and oversees the personnel of the Division, assigned personnel, including making hiring and termination recommendations, including hiring and firing decisions for assigned personnel, approving time off requests for assigned personnel, interviewing applicants, monitoring employee work performance, and making planning work assignments and including developing and enforcing employee schedules to maximize division performance, ensuring quality control standards are met,** delegating responsibilities, providing training and corrective instruction, and evaluating performance.

Develops and directs the Division's planning process to ensure the division is ready and compliant with standards necessary for Public Health Accreditation.

Directs and oversees the collection of service statistics for the Division, ensuring compliance with all applicable state, federal, and local laws and requirements for Health First Indiana Core Service Requirements, applicable to the Division.

Directs and oversees record retention practices, ensuring compliance with all local, state, and federal laws and regulations. Attends meetings with government agencies to stay informed and disseminate information to assigned personnel.

Directs and leads the division for quality improvement initiatives, program activities, annual goals, strategic planning, and accreditation in collaboration with the Health Administrator.

Responsible for disseminating information from the Health Administrator to assigned personnel on all Health Department changes, including but not limited to, legislative changes affecting public services, services available, vaccine supply, local communicable disease concerns, public health emergencies, family planning services, health education and harm reduction outreach activities, and services being provided through community agreements and/or contracts.

Responsible for directing, developing, and implementing workarounds for the Division when internal and external systems fail for service continuity.

Oversees and maintains all vital records databases to ensure quality assurance of records storage and accurate daily records input. Performs routine audits for quality assurance purposes, forwarding issues to the Health Administrator for collaboration on improvement needs to improve division performance.

Ensures timely implementation of all statute changes and monitors national trends and recommendations for future necessary changes to remain legally compliant.

Monitors, maintains, and implements all internal records management software reporting systems and manages all information for the Division. Manages cash receipts and credit card functions, ensuring timely processing of reports and incoming fees.

Registers and trains new hires for access to receipt program, birth and death systems, and online ordering system. Monitors and instructs new hires on required new hire training and obtaining their notary license. Adds new hire to email distribution lists and enrolls in professional memberships. Approves conference and training requests and forwards for approval. Oversees ~~Vital Records~~ **Vital Records Division** employee timekeeping and notifies Health Administrator of any issues.

Directs and oversees daily operations of the ~~Vital Record~~ Division including **assigning personnel to** answering telephone and receiving office visitors, taking messages, directing callers to appropriate persons or department, and responding to inquires as appropriate, providing international travel information, and tracing genealogical records. Notarizes documents as requested.

Oversees opening and closing procedures, ensuring balances for all receipts with applications are accurate and making daily bank deposits. Collaborates with Financial Manager, to correct any discrepancies in monthly Report of Collections.

Compiles all required data and statistics and prepares a variety of reports as required for daily operations and State/Federal statistical reporting requirements related to Department Vital Records, cause of death data, infant mortality, etc.

Totals and balances daily receipts and prepares bank deposits. Prepares monthly report of collections for fees collected and deposited in general fund as requested.

Receives applications for food licenses, real estate, septic system, pool, trash hauler, campgrounds, and other permits. Collects and receipts fees for permits and files documents accordingly.

Participates in code review process making suggestions to Health Administrator. Follows through on code changes affecting Vital Records and other sections as fee changes warrant. Maintains and updates internal fee collection program with any changes.

Participates in accreditation process and quality improvement projects as assigned.

Serves as a backup to monitor Health Department email inbox, forwarding to appropriate persons.

Prepares, records, and preserves vital records according to Indiana Department of Health (IDOH) guidelines, including ensuring proper processing and filing of all vital records, transferring records and compiling required reports, and working with IDOH personnel/officials to coordinate services and resolve problems with procedures and individual records as required. Oversees records retention for Vital Records according to state guidelines, receiving and fulfilling public records requests for birth and death certificates.

Amends local health records according to state guidelines for amendments by notification, court order, correction affidavits, and adoptions, including locating original records and making appropriate amendments.

Issues certified birth and death certificates as requested, including assisting individuals with completing applications, processing certificates, making and certifying copies, and collecting and receipting payments. Provides Auditor with County death reports. Provides infant mortality report and reports of minor's death to officials.

Assists funeral homes and/or families with processing electronic death records as appropriate, including verifying accuracy of forms, filing, and preparing records for filing with IDOH, preparing indexing accordingly, and providing current information regarding regulations and forms for death records to funeral homes and health care providers.

Assists with preparing and processing new birth records with the state, including receiving birth notifications from hospital, reviewing physician verification, sending, and processing birth record verifications to/from mothers, and forwarding records to state. Updates birth record index accordingly. Prepares amendments to birth records and responds to court orders for birth record changes as needed forwarding appropriate forms to state agency as required.

Serves as backup for the Financial Manager position, including but not limited to preparing and submitting accounts payable claims to Health Administrator and Health Officer for review, and forwarding approved documentation to Auditor's Office for processing. Tracks accounts payable checks accordingly. Prepares bi-weekly departmental payroll and maintains department payroll records and ledgers ensuring appropriate funding sources for payroll, reconciling department ledger totals and submitting to Health Administrator for review and approval. **Serves as backup for the Financial Manager position with grant management and grant invoice processing, forwarding to the Health Administrator for review and submission.**

Composes and prepares a variety of letters, memos, reports, and other correspondence for approval by Health Administrator to be distributed to local, state, and federal agencies as required. Assists with proper retrieval and filing of Vital Records and maintains filing systems accordingly. Updates State Regulations books as assigned.

Works with personnel from Social Security, U.S. Military, FBI, Department of Immigration, U.S. Ambassadors, and a variety of other county and local government departments, social agencies, and professionals to request and/or provide birth/death verifications and related information.

Monitors and replenishes departmental forms and supplies, completing and managing supply orders and coordinating other office needs, forwarding orders for review and approval. Maintains repair/maintenance contracts, orders repairs on office equipment, and recommends renewal of service contracts.

Manages and maintains inventory of Health Department capital assets including assets obtained through grant funds.

Serves as a public health emergency responder, responding to and assisting in resolving public health emergencies, including serving on a 24-hour call for emergencies. Activates Emergency Mass Notification System where assigned.

Participates in accreditation process and quality improvement projects as assigned. Attends education workshops and training seminars as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

A degree in Accounting or Business from an accredited institution with 6 years related experience preferred. Associates Degree in related field or equivalent combination of education and previous work experience in Accounting **required.** Ability to speak additional languages preferred.

Possession of or ability to obtain and maintain possession of an Indiana Notary Public license, National Incident Management System (NIMS) certification, and Indiana Vital Records Association (IVRA) certification. Capstone Certification must be obtained within five (5) years of hire date.

Thorough knowledge of standard policies and practices of Monroe County Health Department, with ability to apply appropriate procedures accordingly.

Thorough knowledge of legal requirements and proper procedures for processing, filing, certifying, and releasing vital records information with ability to assure proper maintenance of department files, and apply and interpret procedures.

Working knowledge of basic bookkeeping, with ability to properly collect and receipt payment, total and balance daily receipts, and prepare bank deposits and various financial reports as needed.

Working knowledge of standard English grammar, spelling, and punctuation, ability to type with speed and accuracy, and ability to use standard office equipment, including department computer software, computer, calculator, printer, postage meter, vehicle, keyboard, telephone, copier, and fax machine.

Ability to accurately prepare, verify and file department information and maintain complete and accurate records as directed.

Ability to use resources, including Indiana Code, Vital Statistics Manual, Monroe County maps, GIS, Indiana Birth Registration System, VitalChek Tutorials, Indiana Death Registration System.

Ability to effectively communicate orally and in writing with co-workers, other county departments, funeral homes, care givers, vendors, various state agencies, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to supervise assigned personnel, including making hiring and termination recommendations, interviewing applicants, monitoring and making work assignments and schedules, delegating responsibilities, providing training and corrective instruction, and evaluating performance.

Ability to provide public access to or maintain confidentiality of department information and records according to state and federal requirements.

Shall comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to compile, collate, and classify data and take action based on data analysis.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in written form.

Ability to occasionally work extended hours travel out of town for training and conferences, sometimes overnight.

Ability to respond swiftly and rationally to emergencies on 24-hour basis.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

II. RESPONSIBILITY:

Incumbent performs regular and recurring registrar duties, exercising judgment in ensuring compliance with record and confidentiality requirements. Incumbent performs duties according to a flexible, customary routine with priorities determined by service needs of the public. Errors in work are generally detected. Undetected errors may result in loss of time for correction and inconvenience to department, other government agencies, and members of general public.

III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other county departments, funeral homes, vendors, various state agencies, and the public for a variety of purposes, including processing permits,

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

- *Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR*

Amended: Director of

Vital Records &

Administrative Support

Job title Registrar

Fund-Account-Location 1161 - 10103 - 0000

Department Health

Date 04/23/2024

☒ Full-time ☐ Part-time ☐ Exempt ☐ Non-exempt

Current Classification COMOT C Requested Classification PAT D

Current pay \$ 24.14 per hr Proposed pay \$ 32.29 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Kathy Hertz

TYPE OF ACTION REQUESTED

- ☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

To provide Division oversight for Vital Records and Administrative Support

To provide pay equity across the Health Department

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☒ yes ☐ no

If yes, describe date and outcome of that request:

2023

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and ~~Strikethrough~~ for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒ yes ☐ no

If not, explain why the existing description is no longer accurate:

Does not provide an accurate overview of job responsibilities

Additional responsibilities added

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title Registrar *Classification COMOT C

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☒ yes ☐ no
If yes, specify statute citation and/or case:

SB4

6. Is this request based on increased volume of work? ☒ yes ☐ no If yes, please explain:

In part; additional legislative requirements and oversight

Delegated duties from Health Administrator

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☒ no If *yes*, please describe, including estimated costs:


8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

To ensure compliance with SB4 legal requirements
To provide pay equity

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.


Employee signature

04/23/2024

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.


Signature of Elected Official/Department Head

04/23/2024

Date

Name typed or printed

Lori Kelley

Date **4/23/2024**

Employee Job Questionnaire

COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title: **Director of Vital Records & Administrative Support**

Department: **Health**

Employee Name: **Kathy Hertz**

FLSA Status: ☒ Exempt ☐ Non-exempt

• Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

• Instructions •

1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.
4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

DO NOT DETACH THIS INSTRUCTION SHEET

Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does NOT involve performance evaluations of individuals. We aren't collecting information about how you perform, only what you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner, Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is not a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands the essential functions and the skills necessary to perform the job.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

- You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "*Maintains statistics on computer for Indiana Department of Environmental Management (IDEM).*"
- Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms.*"
- Are **machines, equipment, or special tools** involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

Section I

Essential Functions of Position

1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Directs and oversees the Division's programs and services, leading the Division in accordance with the department's mission and vision

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

If Duties Section of your existing job description is accurate please note "see existing description" and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
<i>Supervise subordinate personnel</i>	<u>B</u>	<u>G</u>
<u>ESSENTIALITY</u>	<u>FREQUENCY</u>	
A= Marginal function of the job	C= Perform annually at a minimum	
B= Essential function of the job	D= Perform quarterly at a minimum	
	E= Perform monthly at a minimum	
	F= Perform weekly at a minimum	
	G= Perform on regular (daily) basis	

List Primary Duties:

1. Directs and oversees the personnel of the Division

Essen Freq

B ▼ G ▼

2. Conducts hiring and firing, approving time off requests for assignment personnel, monitoring employee work performance, and planning work assignments

B ▼ G ▼

3. Oversees quality control standards and provides training and corrective instruction as necessary to improve Division performance B G
4. Develops and directs the Divisions planning process to ensure the division is ready and compliant with standards necessary for Public Health Accreditation. B F
5. Directs and oversees the collection of service statistics for the Division, ensuring compliance with all applicable state, federal, and local laws and requirements for Health First Indiana Core Service Requirements, applicable to the Division. B G
6. Directs and oversees record retention practices, ensuring compliance with all local, state, and federal laws and regulations. B G
7. Responsible for directing, developing, and implementing workarounds for the Division when internal and external systems fail for service continuity. B F
8. Ensures timely implementation of all statute changes and monitors national trends and recommendations for future necessary changes to remain legally compliant. B E
9. Performs routine audits for quality assurance purposes, forwarding issues to the Health Administrator for collaboration on improvement needs to improve division performance. B F

10. Responsible for disseminating information from the Health Administrator to assigned personnel on all Health Department changes B F
11. Monitors, maintains, and implements all internal records management software reporting systems and manages all information for the Division. B F
12. Oversees and maintains all vital records databases to ensure quality assurance of records storage and accurate daily records input. B G
13. Registers and trains new hires for access to receipt program, birth and death systems, and online ordering system. B D
14. Oversees opening and closing procedures, ensuring balances for all receipts with applications are accurate and making daily bank deposits. B G

Section II

Job Requirements/Training/Certification

1. Check level of formal education that is required for your position. When specifying college degrees, please identify acceptable fields of study.

☐ High school diploma/GED ☐ Associate Degree ☐ Baccalaureate Degree ☐ Masters Degree

☒ Other (Please describe): A degree (associate, baccalaureate, or masters) with related experience

Acceptable fields of study: accounting or business

2. Specialized training, certification, and/or specific experience required for your position (such as Certified Public Accountant).

Capstone Certification, National Incident Management System, Emergency Mass Notification System, Indiana Vital Records Association

3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

ccounting and budgeting, grant management, payroll processing and auditing; biligual preferred; critical thinking and problem solving; responding to emergencies, bookkeeping and preparing financial reports; public speaking; drafting policies and procedures

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

professional journals, textbooks, legal codes, and technical manuals

5. Does your position require that you have a valid driver's license? ☒ Yes ☐ No If yes, for which duties?

emergencies; as needed for banking and visits to local organizations

6. Does your position require you to be at least 21 years of age? ☐ Yes ☒ No

7. Does your position require passage of a:

Medical exam? ☐ Yes ☒ No

Drug test? ☒ Yes ☐ No

Psychological exam? ☐ Yes ☒ No

Written exam? ☐ Yes ☒ No

Other tests: background

8. Check and list equipment you operate as a regular part of performing your duties:

☒ Computer ☐ Typewriter ☒ Calculator ☐ Transcriber/dictaphone ☐ Vehicle

☐ Other (Please describe)

9. Your fundamental job duties may involve some relationship between you and data (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that most accurately describe your involvement with data.

☐ Compare or observe similarities and differences between data, people, or things.

☐ Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.

☐ Compile, collate, or classify data.

☐ Analyze, evaluate, observe, diagnose, investigate.

☒ Coordinate, place, make determinations, take action based on data analysis.

☐ Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that most accurately apply to your job responsibilities.

- ☐ Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- ☐ File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- ☐ Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- ☒ Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advice people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

Section III

Difficulty of Work/Responsibility

1. Which of the following phrases best describes the type of supervision you receive?

- ☐ **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- ☐ **Assignments and objectives set jointly by immediate supervisor and myself.** Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- ☐ **Indirect or occasional supervision.** Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- ☒ **General supervision.** Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- ☐ **Administrative or advisory direction from a board or CEO.** Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

2. Which of the following phrases best describes the criteria for which your work is reviewed?

Work is reviewed primarily for...

- | | | |
|--|--|--|
| <input type="checkbox"/> Attainment of objectives | <input type="checkbox"/> Appropriate supervision or direction of assigned operations | |
| <input type="checkbox"/> Compliance with precedent | <input type="checkbox"/> Adherence to instructions/guidelines | <input checked="" type="checkbox"/> Compliance with legal requirements |
| <input type="checkbox"/> Technical accuracy | <input checked="" type="checkbox"/> Compliance with Department policy | <input type="checkbox"/> Effect on Department goals/objectives |
| <input type="checkbox"/> Soundness of judgment | <input type="checkbox"/> Other (please describe): | |

If you checked more than two, please provide explanation:

3. Check one of the following statements that most accurately describes the judgment you use in performing fundamental job duties.

- ☐ Decisions are always determined by specific instructions or existing, well established policies and procedures.
- ☐ On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- ☐ Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- ☐ Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- ☒ Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- ☐ Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

legal code requirements and legal retention practices

5. What programs, persons and/or functions are directly affected by the decisions you make?

The Health Department, Division of Vital Records, the public and peers

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

hiring and firing; Health Administrator can overrule

Section IV

Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Lori Kelley

Title: Health Administrator

2. Complete A) and B) only if you supervise or direct the work of others:

A) List names and position titles of employees you supervise or direct as a regular part of your duties.

Jessica Egan, Tina Burres, Eric Diamond; Assistant Registrar's

Patricia Cullins - Data Specialist Clerk

B) Check which statements most accurately describe your managerial/supervisory responsibilities.

- ☒ Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
- ☐ Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
- ☒ Interview candidates for openings and make hiring recommendations.
- ☐ Make hiring decisions.
- ☒ Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
- ☐ Plan, delegate and control work assignments and special projects to assigned staff.
- ☒ Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
- ☒ Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
- ☐ Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
- ☐ Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
- ☐ Review salaries of assigned staff and recommend changes when warranted.
- ☐ Recommend personnel actions, such as promotions, transfers, demotions.
- ☒ Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
- ☒ Maintain discipline and recommend corrective action as warranted.
- ☒ Communicate and administer personnel programs and procedures for my area in accordance with approved policies.

3. List other departments, agencies, organizations, and others with whom you regularly communicate.

4. Check which statements most accurately describe your contact with employees, customers, governmental officials, or the general public.

- ☐ **Cooperative Work Relationship:** Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
- ☒ **Render Service:** Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
- ☐ **Instruct:** Teach or present subject matter to others through explanation, demonstration and supervised practice.
- ☐ **Negotiate:** Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

- ☐ **Mentor:** Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

Section V

Physical Effort/Work Environment

1. Which of the following best describes your primary working environment?

- ☐ Laboratory ☒ Standard office ☐ Storeroom ☐ Vehicle ☐ Outdoors
☐ Garage/shop ☐ Manufacturing setting ☐ Other (please describe):

If you checked more than one, please provide additional explanation.

2. Which of the following best describes your primary working conditions?

ESSENTIALITY

N/A= Not Applicable to job

A= Marginal requirement of job

B= Essential requirement of job

Essentiality

- work alone with minimum supervision
 work under time pressure
 work on several tasks at the same time
 read/carry out simple written instructions
 apply knowledge of people, locations
 plan and layout assigned work projects
 compute/calculate, such as interest
 count, make simple arithmetic additions/subtractions
 read/interpret detailed prints, sketches, layouts, specifications, maps
 prepare detailed reports, such as financial statements, sales activity, product feasibility
 plan and present public speaking presentations, fund raisers, special events
 sitting & walking at will
 standing/walking for long periods

Essentiality

- work with others in a team environment
 work rapidly for long periods
 understand and carry out oral instructions
 memorize and retain instructions
 present findings in oral or written form
 testify in legal proceedings/court
 sitting for long periods
 walking on uneven terrain

<input type="checkbox"/> A <input type="checkbox"/> work in extreme hot or cold temperatures	<input type="checkbox"/> work in wet/icy surroundings	
<input type="checkbox"/> A <input type="checkbox"/> respond to emergencies from off-duty status	<input type="checkbox"/> work with or near chemicals (please list)	
<input type="checkbox"/> A <input type="checkbox"/> work near fumes, odors, dust, dirt (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> work in a noisy environment (describe noise source)		
<input type="checkbox"/> A <input type="checkbox"/> work in confined areas (please describe)		
<input type="checkbox"/> A <input type="checkbox"/> wear protective clothing or equipment (please describe)		
<input type="checkbox"/> A <input type="checkbox"/> work in high places, such as ladders, roofs, bucket truck (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> work with or exposed to violent/irate individuals (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> respond to situations involving potential physical harm to self and others (please describe)		
<input type="checkbox"/> B <input type="checkbox"/> lifting under 25 pounds	<input type="checkbox"/> A <input type="checkbox"/> lifting 25 to 50 pounds	<input type="checkbox"/> B <input type="checkbox"/> lifting over 50 pounds
<input type="checkbox"/> B <input type="checkbox"/> pushing/pulling objects	<input type="checkbox"/> B <input type="checkbox"/> carrying objects	<input type="checkbox"/> B <input type="checkbox"/> crouching/kneeling
<input type="checkbox"/> B <input type="checkbox"/> bending at waist	<input type="checkbox"/> B <input type="checkbox"/> reaching	<input type="checkbox"/> A <input type="checkbox"/> driving
<input type="checkbox"/> B <input type="checkbox"/> close vision	<input type="checkbox"/> B <input type="checkbox"/> far vision	<input type="checkbox"/> B <input type="checkbox"/> color perception
<input type="checkbox"/> B <input type="checkbox"/> depth perception	<input type="checkbox"/> B <input type="checkbox"/> speaking clearly	<input type="checkbox"/> B <input type="checkbox"/> hearing sounds/communication
<input type="checkbox"/> B <input type="checkbox"/> handling/grasping objects	<input type="checkbox"/> B <input type="checkbox"/> fingering objects (picking, pinching)	

3. List the three most physically demanding activities you regularly perform in your job.

lifting under 25 pounds
pushing/pulling objects
frequent sitting and standing

4. List the three most emotionally demanding activities you regularly perform in your job.

work with or exposed to violent or irate individuals
respond to situations involving potential harm
working fast under pressure on multiple projects

5. What is your normal work schedule (example, 8 a.m. 4 p.m. M-F)?

8-4p; M-F

6. Are you required to:

a. work extended hours

Never

☐

Regularly

☐

Occasionally

☒

b. work weekends

☐
☐
☒

	<u>Never</u>	<u>Regularly</u>	<u>Occasionally</u>
c. work evenings	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
d. travel out of town, but not overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For what purpose?			
<div>training/conferences</div>			
c. travel out of town overnight	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For what purpose?			
<div>training/conferences</div>			
f. respond to emergencies on 24-hr basis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
g. on call on rotation basis	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

public facing

8. Is your position politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Section VI

Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type)

Kathy Hertz

Hire date

1/4/2021

Title

Registrar

Department

Health

Signature



Date

4/23/24

Supervisor: I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes ☐ No ☒

Signature

Lori Kelley

Date

4/23/2024

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc.
 118 South Franklin Street
 Muncie, IN 47305
 Phone: (765) 286-5195
 Fax: (765) 286-2824

FLSA EXEMPT/NON-EXEMPT COMPLIANCE QUESTIONNAIRE

NAME Kathy Hertz
JOB TITLE Registrar (Director of Vital Records & Admin Support)
DEPARTMENT Health Department
DATE 4/23/24

This questionnaire is designed to assist in determining your "exempt" or "non-exempt" status under the Fair Labor Standards Act (FLSA). Please answer the following questions. If a particular question does not apply to you, please circle or insert "NA" to indicate "Not Applicable."

1. Is your position classified as Exempt or Non-exempt according to FLSA standards for overtime purposes?

Exempt ☐ Non-exempt ☒ don't know (Please circle the appropriate response)

2. Are you paid a salary or an hourly wage?

Salary ☐ Hourly ☒ (Please circle the appropriate response)

3. Are you currently receiving overtime compensation for hours worked over 40 in a work week?

Yes ☐ No ☒ (Please circle the appropriate response)

4. Are you currently receiving compensatory time for hours work over 40 in a work week?

Yes ☒ No ☐ (Please circle the appropriate response)

5. If you receive compensatory time, do you receive compensation at the rate of one and one-half (1 ½) times for all hours worked over 40 hours in a work week?

Yes ☒ No ☐ (Please circle the appropriate response)

6. Is your *primary* duty managing a recognized department or subdivision?

Yes ☒ No ☐ (Please circle the appropriate response)

7. If you answered "Yes" to question 6, what percentage of your work time is spent engaged in duties that are *not* directly related to managing your department or subdivision (such as performing similar duties to subordinates or standard duties that are non-policy making or non-supervisory?) (Please circle the appropriate response)

NA 5% 10% 15% ☒ 20% 25% 30% 35% 40% 45% 50%
55% 60% 65% 70% 75% 80% 85% 90% 95% 100%

8. Do you interview, select, and hire employees?

☒ Yes No (Please circle the appropriate response)

9. Do you interview and make recommendations for hiring new employees?

☒ Yes No (Please circle the appropriate response)

10. Do you recommend compensation levels and/or hours worked for employees?

☒ Yes No (Please circle the appropriate response)

11. Do you evaluate employees for purposes of recommendations on promotions or other changes in status?

☒ Yes No (Please circle the appropriate response)

12. Do you assign work to employees?

☒ Yes No (Please circle the appropriate response)

13. Do you resolve employee complaints, grievances, and disciplinary matters?

☒ Yes No (Please circle the appropriate response)

14. Do you determine materials and supplies to be used as well as control the distribution of materials and supplies in your workplace?

☒ Yes No (Please circle the appropriate response)

15. Please list the three (3) job duties that require the greatest percentage of your time?

Duty: <u>Overseeing and directing daily employee compliance</u>	Percentage of time: <u>50%</u>
Duty: <u>Developing and enforcing work schedules to maximize efficiency</u>	Percentage of time: <u>10%</u>
Duty: <u>Evaluating employee performance and providing coaching/feedback</u>	Percentage of time: <u>20%</u>

16. Does your position require a baccalaureate degree or advanced degree (such as masters degree, law degree, or doctorate)?

Yes ☒ No (Please circle the appropriate response)

17. Please list the type of degree or degrees required, if applicable:

18. Please list an example or examples of how you directly apply your degree or degrees to perform your position, if applicable:

19. If your position requires a baccalaureate degree or advanced degree (such as masters degree, law degree, or doctorate), what percentage of your work time is spent engaged in duties that are not directly related to using the knowledge obtained from such a degree? (Please circle the appropriate response)

NA 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%
55% 60% 65% 70% 75% 80% 85% 90% 95% 100%

20. Please list the number of employees you supervise by job titles and indicate full-time or part-time status:

3 FT Assitant Registrars	
1 PT Data Clerk	

21. Of those employees listed in question 20, do you have the authority to discipline and terminate?

☒ Yes No (Please circle the appropriate response)

22. Does your position allow you to make independent policy decisions, free from immediate supervision, regarding matters of significant importance to your employer?

☒ Yes No (Please circle the appropriate response)

23. Please list an example or examples of the highest level policy decision you are authorized to make:

- Who is able to obtain vital records & what is required to do so, while following Indiana Code
- How payment are collected, recorded, and deposited.
- How Vital Records are kept, stored, and maintained, while following Indiana records retention laws & guidelines.

24. Please list an example or examples of the highest level budgetary decision you are authorized to make:

All general office supplies for the department & my division as well as specialized supplies & forms for my division.

25. What is the annual budget for your department or subdivision?

\$8000.00

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Financial Manager
DEPARTMENT: Health
DIVISION: ~~Administration~~ **Vital Records and Administrative Support**
WORK SCHEDULE: As Assigned
JOB CATEGORY: PAT B (*Professional, Administrative, Technological*)

DATE WRITTEN: July 2020

STATUS: Full-time

DATE REVISED: February 2021, January 2024 **April 2024**

FLSA STATUS: ~~Non-exempt~~
Exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skills, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job unless the accommodation would present an undue hardship.

Incumbent serves as Financial Manager for the Monroe County Health **Department's Vital Records and Administrative Support Division**, responsible for performing financial duties of department ~~and reviewing completed employee new hire documentation.~~

DUTIES:

Establishes accounting structures to gather new data and meet changing conditions. Prepares, analyzes and reports all Health Department budgets, including monitoring and recording expenditures, analyzing trends and identifying system dysfunctions, and recommending procedural efficiency as appropriate. Creates projected annual budgets, **as assigned, and makes adjustments as necessary.**, ~~including budget for annual budget hearings, reviewing with Supervisor and making adjustments.~~

~~Prepares requests and attends~~ **Assists with preparing requests for** Council meetings, budget sessions, and budget hearings providing supporting information and necessary documentation as directed.

Prepares and submits accounts payable claims for review, forwarding to Auditor for processing and tracking accounts payable checks accordingly.

Obtains price quotes and prepares/submits purchase requests to appropriate agency, department, or Board as directed. Creates, maintains, and updates vendor files and account lines, and annual appropriations including grant funds, communicating with vendors regarding purchases, deliveries, and payments.

Balances and reconciles accounts and grant funds with Auditor's records recommending line-item transfers as needed to Health Administrator.

Prepares Workers' Compensation Claims and FMLA for department employees submitting to Administrator for approval.

Creates, maintains, and monitors department ledgers and cash balances, providing fiscal projections and recommendations for fee increases and/or expenditure constraints.

Prepares and presents oral or written management and budgetary reports, such as transfers, additional appropriations, and changes in salary ordinance to Administrator as requested.

Assists in creating and writing departmental grants. Oversees compliance of all departmental grants and monitors grant budgets, including monitoring grant expenditures against budgets, preparing/processing grant claims for reimbursement and submitting upon Administrator's approval, creating/maintaining databases and spreadsheets, compiling data, preparing and submitting financial reports, and assisting Auditor as needed.

Prepares bi-weekly departmental payroll, maintaining department payroll records and ledgers, ensuring appropriate funding sources, reconciling department ledger totals, and submitting to Administrator for review and approval. Maintains payroll records of work study employees as required.

Conducts random financial reviews of deposits and bank statements to ensure accuracy. Prepares and submits monthly Report of Collections collaborating with Registrar to correct discrepancies as directed. Prepares and submits financial reports and financial statements, including documentation and preparation for Annual Report and State Board of Accounts Audit as required, ensuring compliance with Federal, State and Local legal and regulatory requirements.

Completes a variety of periodic reports as required or requested by County officials and funding/licensing agencies, including conducting assessments and compiling statistics, financial information, and narratives. Periodically creates forecasts and budget summary reports for Health Administrator and Auditor as directed.

Maintains and updates electronic Employee Service Records, such as status change forms, longevity payments and salary step increases, submitting as required.

Assists Registrar with maintenance of inventory of Health Departments capital assets including assets obtained through grant funds and performs audits quarterly.

Collects, prepares and submits medical billing for the department per reimbursement guidelines including but not limited to administration fee for immunizations, lead risk assessments and case management, and/or reproductive health care services.

Attends a variety of meetings, seminars, professional development workshops, and staff meetings.

Performs related duties as assigned.

I. JOB REQUIREMENTS:

Baccalaureate Degree in Accounting, Office/Business Administration, Management, or related field or equivalent combination of education and experience.

Practical knowledge of grant funding and management or ability to obtain Grant Management training and/or certifications.

Thorough knowledge of standard bookkeeping principles and fund accounting, with ability to accurately maintain and reconcile ledgers and other records, and complete related financial reports and payroll records as required.

Thorough knowledge of standard office practices and procedures and ability to apply such knowledge to a variety of interrelated processes, tasks and operations.

Knowledge of and ability to operate a variety of computer software and equipment used by the department, including printer, telephone, calculator/adding machine, fax machine, copier, and postage meter, accounting, database and spreadsheets, and the ability to design and maintain data for reporting to several State and Federal agencies in order to be in compliance with their regulations.

Working knowledge of Standard English grammar, spelling and punctuation, ability to prepare correspondence, documents and written reports as required, and ability to maintain complete, accurate accounting records and prepare detailed written reports and financial statements as required.

Ability to effectively communicate orally and in writing with co-workers, other County personnel, other government departments/agencies, vendors, and the public, including being sensitive to professional ethics, gender, cultural diversities and disabilities.

Ability to understand, memorize, retain, and carry out written or oral instructions. Ability to compile, analyze and evaluate data, make determinations, and present findings in oral or written form.

Ability to compute/perform arithmetic operations, such as developing budgets, calculating payroll, and monitoring all revenue and expenditures.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Shall comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time, work rapidly for long periods, work under pressure of formal deadlines, work through interruptions, detect errors, and adapt to changing priorities.

Ability to occasionally work extended evening and/or weekend hours, and occasionally travel out of town for meetings/conferences sometimes overnight.

II. DIFFICULTY OF WORK:

Incumbent performs a variety of regular and routine duties with priorities determined by a flexible, customary routine and Supervisor. Assignments are guided by broad policies and/or general objectives. Errors in work are primarily detected or prevented through Supervisor review and notification from other agencies, and standard bookkeeping checks. Undetected errors could result in loss of time for correction, inconvenience to other agencies, or loss of money. Work is reviewed during critical phases

and upon completion for accuracy and compliance with funding source regulations.

III. RESPONSIBILITY:

Incumbent is responsible for proper completion of assigned tasks where desired results are clearly indicated. Incumbent exercises independent judgment in a variety of situations and circumstances, using departmental policies and supervisory review for guidance. Unusual problems or situations are discussed with supervisor, and work product is periodically reviewed for soundness of judgment and conclusions and overall adherence with departmental policies.

IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent communication with co-workers, other County personnel, other government departments/agencies, vendors, and the public for purposes of supervising and coordinating work, resolving problems and requesting and/or providing information.

Incumbent reports directly to the ~~Health Administrator~~. **Director of Vital Records and Administrative Support**

V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in standard office environment, involving sitting/walking at will, sitting/standing/walking for long periods, lifting/carrying objects weighing up to 25 pounds, bending/crouching/kneeling, pushing/pulling objects, keyboarding, close/far vision, depth/color perception, speaking clearly, hearing sounds/communication, reaching, and handling/grasping/fingering objects. Incumbent occasionally works extended evening and/or weekend hours, and occasionally travels out of town for meetings/conferences, sometimes overnight.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Financial Manager for the Monroe County Health **Department's Vital Records and Administrative Support Division** describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes No

Applicant/Employee Signature

Date

Type or Print Name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

Type or Print Name

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• **Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR**

Job title Financial Manager Fund-Account-Location 1159-10067-0000
Department Health Date 04/23/2024

☒ Full-time ☐ Part-time ☐ Exempt ☒ Non-exempt

Current Classification PAT B Requested Classification PAT C
Current pay \$ 27.44 per hr Proposed pay \$ 28.70 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Eric Gause

TYPE OF ACTION REQUESTED

☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

To provide a pay rate that is comparable to duties being performed, required

knowledge to perform duties, and complexity of work

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☒ yes ☐ no

If yes, describe date and outcome of that request:

2023; no reclassification

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and **Strikethrough** for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☐ yes ☒ no

If not, explain why the existing description is no longer accurate:

Pay does not accurately represent the complexity of work duties

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title Eric Gause *Classification PAT B

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐ yes ☒ no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☐ yes ☒ no If yes, please explain:

7. If you answered yes, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☐ no If yes, please describe, including estimated costs:

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

By providing pay equity for job duties and skills necessary to fulfill duties

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.


Employee signature

04/23/2024

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.

If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council Personnel Administration Committee, and consultants of the Council.


Signature of Elected Official/Department Head

04/23/2024

Date

Name typed or printed

Lori Kelley

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Licensed Practical Nurse
DEPARTMENT: Health
DIVISION: ~~Futures Family Planning Clinic~~
Clinical Services and Case Management
WORK SCHEDULE: As assigned
JOB CATEGORY: PAT (Professional, Administrative, Technological)

DATE WRITTEN: January 2007
DATE REVISED: February 2021

STATUS: Full-time
FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Licensed Practical Nurse (LPN) for the Monroe County Health Department's ~~Futures Family Planning Clinic~~ **Clinical Services and Case Management Division**, responsible for providing practice nursing services and education to Family Planning clients.

DUTIES:

Provides nursing care to clients under the direction of Nurse Practitioner (NP)/Advanced Practice (AP) Nurse, including conducting patient assessments and monitoring and recording vital signs, such as weight and blood pressure.

Assists NP/AP Nurse as needed, preparing examination rooms with appropriate equipment and supplies, providing lab results, instructing clients on treatment and medication procedures, and answering clients' questions.

Assists NP/AP Nurse with conducting Telehealth appointments.

Collects and prepares blood samples and other body fluids for laboratory tests. Performs routine laboratory tests.

Reviews lab reports and follows standing order regarding notification and follow up.

Assists clients, providing instruction, education, and program orientation, scheduling appointments, and completing medical forms.

Prepares written reports in accordance with department and county policies. Submits quarterly summary reports as required and compiles annual public health report.

Assists ~~Clinic Manager~~ **Director of Clinical Services and Case Management** in the preparation of numerous special reports required for compliance with the Indiana Family Health Council Grant and Federal Law.

Assists in greeting clients and answers telephone, responding to inquiries, taking messages, and directing calls to appropriate individual. Conducts reminder calls, as appropriate, to clients for scheduled appointments.

Assists clients, including scheduling appointments, completing forms, providing instruction, and answering questions. Accesses clients' charts for medication refills and responds to phone messages.

Conducts screening interviews to establish client eligibility and makes referrals to others as necessary. Utilizes electronic medical records (EMR) for patient chart documentation.

Assists in implementing treatment plans and participates in evaluating client responses to treatment plans. Identifies and communicates client problems or issues based upon data collection. Documents client's condition, response to treatment, and progress towards outcome goal.

Prepares, packages, administers, and records various medications in accordance with Indiana Family Health Council Standards and Nurse Practitioner or physician directive. Recognizes and reports adverse drug reactions.

May supervise nursing assistants and/or nursing students.

Monitors examination/treatment room's equipment, cleaning and restocking as necessary.

Assists the Director in the maintenance of inventory of medical supplies and forms. Orders and restocks clinic as necessary. Inventories and orders medical supplies such as birth control devices, contraceptives, various specific prophylactics, and antibiotics.

Maintains clients' rights to privacy by creating and maintaining a secure environment. Ensures confidentiality of patient's records as required by Federal Health Insurance Portability and Accountability Act (HIPAA). Ensures compliance with all applicable Monroe County Health Department policies and procedures, IFHC standards, HIPAA regulations, and all other federal and state laws relating to privacy, confidentiality, and service delivery.

Advises ~~supervisor~~ **NP/AP Nurse** of issues related to client's learning needs about the disease process, readiness, and capacity for learning.

Performs various administrative duties, including data collection, data entry, recording observations accurately and concisely, and monitoring changes in clinical status.

Assists with tabulating daily payments and balances and reports to Director of Vital Records and Administrative Support and Health Administrator. Collects and deposits all monies received by clinic into bank account in the absence of the Clinical Coordinator and Clinical Assistant.

Collaborates with the Director to plan community engagements. Engages in community outreach through public speaking for social service organizations, other requests for education, or at health fairs, and assists in marketing plan development. ~~Makes presentations to various organizations and agencies including schools, churches, and volunteers.~~

Assists in completing tasks related to quality improvement and accreditation.

Attends annual educational and training sessions as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS:

Current Indiana Licensed Practical Nurse license. Minimum of five (5) years' related experience preferred. Possession of or ability to obtain Basic Life Support (BLS) certification.

Working knowledge of and ability to make practical application of public health laws, accepted principles and practices of Public Health Nursing.

Working knowledge of health and social services available to County residents and ability to coordinate services and facilitate referrals as appropriate.

Working knowledge of standard office practices, basic computer skills, and medical terminology with the ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Working knowledge of standard English grammar, spelling, and punctuation and ability to prepare written reports as required.

Ability to properly operate a variety of standard office equipment, including computer, telephone, calculator, fax machine, printer, and copier.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' office, hospitals, laboratories, and the general public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to analyze and evaluate test results, make determinations, and present findings in oral or written form.

Ability to protect oneself from contracting infectious diseases by avoiding high risk environments and by having knowledge of and utilizing universal health precautions.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written and oral instructions.

Ability to file, post, copy data from one document to another and interview patients to obtain information.

Ability to occasionally work extended hours and travel out of town for training and meetings.

II. DIFFICULTY OF WORK:

Majority of duties are performed within clear and well-defined guidelines that are applied to specific tasks. On rare occasions, decisions, are made in the absence of specific policies and procedures, and/or guidance from supervisor.

III. RESPONSIBILITY:

Incumbent performs a variety of standard, recurring duties with work priorities primarily determined by supervisor and service needs of the public. Assignments are guided by definite objectives using a variety of methods and procedures, with moderate flexibility in the job. Decisions are always determined by specific instructions and/or existing, well established policies and procedures. Work is reviewed primarily for adherence to guidelines, attainment of objectives, and compliance with Department policy.

IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' office, hospitals, laboratories, and the general public for the purposes of exchanging information, providing instructions to others, and rendering services.

Incumbent reports directly to ~~Clinic Manager and/or Medical Director.~~ **the Nurse Practitioner and/or Medical Director for medical procedures.**

Incumbent reports directly to the Director of Clinical Services and Case Management for all administrative/operational matters.

V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs a variety of duties in a clinical setting including sitting/walking at will, lifting/carrying objects weighing up to 25 pounds, bending/crouching/kneeling, reaching, close/far vision color/depth perception, hearing sounds/communication, and handling/grasping/fingering objects.

Incumbent occasionally works extended hours and travels out of town for training and meetings.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Licensed Practical Nurse for the Monroe County Health **Department's Clinical Services and Case Management Division** describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

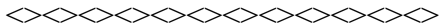
Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes _____ No _____

Applicant/Employee Signature

Date

Type or Print Name



I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

Type or Print Name

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• **Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR**

Job title Licensed Practical Nurse

Fund-Account-
Location 8126/8150-10188-9624

Department Health

Date 04/29/2024

☒ Full-time ☐ Part-time ☐ Exempt ☒ Non-exempt

Current Classification PAT A

Requested Classification PAT B

Current pay \$ 25.92 per hr

Proposed pay \$ 27.44 per hr

Employee(s) in this position: *(attach supplemental sheet if necessary)*

Christine Brackenhoff

TYPE OF ACTION REQUESTED

- ☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☒ Reclassification due to change in duties, responsibilities, work conditions, etc.
☐ Other *Please describe:*

**Questions 1 through 3 to be completed jointly by the employee and/or
Elected Official/Department Head initiating the review**

1. Describe why this new position/added employee/classification review is necessary.

To update job description; To provide pay equity across the department

based upon job duties being performed

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐ yes ☒ no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and **Strikethrough** for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☒ yes ☐ no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title	<u>Licensed Practical Nurse</u>	*Classification	<u>PAT A</u>
Job title	<u>Clinical Manager</u>	*Classification	<u>COMOT C</u>
Job title	<u>Financial Manager</u>	*Classification	<u>PAT B</u>

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐ yes ☒ no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☐ yes ☒ no If yes, please explain:
somewhat; increased complexity of work as back-up assistance

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ yes ☐ no If *yes*, please describe, including estimated costs:

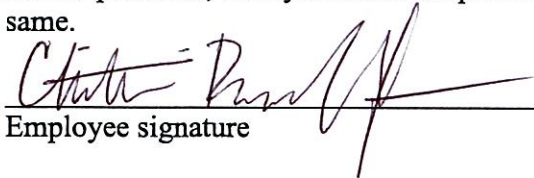
8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

By providing continuity of services; by providing pay equity

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.


Employee signature

04/29/2024

Date

05/01/2024

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ agree ☐ disagree.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Lori Kelley

04/29/2024

Signature of Elected Official/Department Head

Date

Name typed or printed

Lori Kelley

**POSITION DESCRIPTION
COUNTY OF MONROE, INDIANA**

POSITION: Nurse Practitioner/Advanced Practice Nurse
DEPARTMENT: Health
DIVISION: ~~Futures Family Planning Clinic~~
Clinical Services and Case Management
WORK SCHEDULE: As assigned
JOB CATEGORY: SO (Special Occupations)

DATE WRITTEN: January 2007

STATUS: Full-time

DATE REVISED: February 2013, February 2021

FLSA STATUS: Exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Nurse Practitioner (NP)/Advanced Practice (AP) Nurse for the Monroe County Health Department's ~~Futures Family Planning Clinic~~ **Clinical Services and Case Management Division**, responsible for providing primary care to clinic clients and ensuring compliance with established policies, practices, protocols, and professional and public health standards.

DUTIES:

Performs physical examinations, including, but limited to, pelvic examinations, breast examinations, testicular examinations, STD screening, blood glucose screenings, and contraceptive placement. Recommends tests and procedures to obtain additional data and develops comprehensive statement of client's exam results. **Reviews lab results and determines appropriate follow up.**

Collaborates with the supervising physician in developing, recommending, and implementing a plan of treatment for selected clients, in accordance with Indiana Law.

Conducts Telehealth appointments as appropriate.

Manages the care of selected clients using established protocols. Ensures compliance with all applicable Monroe County Health Department policies and procedures, IFHC standards, HIPAA regulations, and all other Federal and State laws relating to privacy, confidentiality, and service delivery. Maintains clients' rights to privacy by creating and maintaining a secure environment.

Ensures proper administration of medications. Manages medication stock, ensuring proper storage of medications and proper handling of pharmacy waste. Recognizes and reports adverse drug reactions as needed.

Completes mandatory reports and ensures compliance with all regulatory agencies.

Supervises medical care provided by clinic, ensuring accuracy of clinic functions. Supervises assigned staff, including planning/delegating work assignments, making work schedules, ensuring accuracy of clinic functions, training employees, and evaluating performance.

Ensures medical records are submitted for physician review, as outlined in the Collaborative Practice Agreement. Ensures Electronic Medical Records (EMR) are maintained properly and any paper records are legible, up to date, and contain comprehensive documentation.

Assesses client's educational needs and level of understanding and individualizes client teaching. Documents teaching and client's level of understanding and response. Conducts follow-up with clients on unresolved matters related to client assessments, treatment, and/or disposition.

Consults with ~~Clinic Manager~~ **Director of Clinical Services and Case Management**, Health Administrator, and/or contracted Medical Director as appropriate on potentially problematic staff or client situations. Assists ~~supervisor~~ **Director** in setting program goals and works with ~~supervisor~~ **Director** to meet these goals.

Collects and analyzes clinical indicators for the purpose of improving client outcomes.

Works collaboratively with other health care providers to identify family planning needs in the community.

Maintains current on information in area of practice by participating in continuing education and in-service programs, attending workshops, and reading professional articles and journals.

Plans and participates in in-service programs with clinical content for program staff and educational programs for clients and the community.

Participates and represents the Health Department at health fairs and community events, including developing health education materials such as pamphlets and brochures, speaking publicly to groups about family planning, and preparing presentations.

Attends educational and training programs as required.

Performs related duties as assigned.

I. JOB REQUIREMENTS:

Master's Degree in Nursing and current Indiana license to practice as a Nurse Practitioner or an Advanced Practice Nurse with a minimum of one (1) year experience. Possession of or ability to obtain Basic Life Support (BLS) certification.

Must possess current, unrestricted Indiana CSR and be eligible for U.S. DEA certification.

Working knowledge of and ability to make practical application of public health laws and accepted principles and practices of Public Health Nursing.

Working knowledge of health and social services available to County residents, and ability to coordinate services and facilitate referrals as appropriate.

Working knowledge of standard English grammar, spelling, and punctuation and ability to prepare written reports as required.

Ability to supervise assigned staff, including planning/delegating work assignments, making work schedules, ensuring accuracy of clinic functions, training employees, and evaluating performance.

Ability to effectively examine and screen individuals, assesses needs, and provides information, counseling, treatment, and referrals as appropriate.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' offices, hospitals, laboratories, and the general public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to analyze and evaluate test results, make determinations, and present findings in oral or written form.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written and oral instructions.

Ability to file, post, copy data from one document to another and interview patients to obtain information.

Ability to occasionally work extended hours and travel out of town for training and meetings.

II. DIFFICULTY OF WORK:

Incumbent performs a narrow range of regular duties which involve consideration of many variables. Majority of duties are performed within clear and well-defined guidelines that are applied to medical protocols, with decisions always determined by specific instructions or existing, well established policies and procedures from Indiana Department of Health and Indiana Family Health Council.

III. RESPONSIBILITY:

Incumbent ensures proper implementation of public health programs according to technical specifications and standard practices of the profession. Incumbent works with minimum supervision, referring to supervisor for any unusual and/or unprecedented circumstances not covered by existing policies and procedures. Work is periodically reviewed for technical accuracy and soundness of judgment.

IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other County departments, clients, accreditation and regulatory agencies, providers, community organizations, physicians' offices, hospitals, laboratories, and the general public for the purposes of exchanging information, providing instructions to others, and rendering services.

Incumbent reports directly to ~~Clinic Manager and/or Medical Director.~~ **the Medical Director for medical procedures.**

Incumbent reports directly to the Director of Clinical Services and Case Management for all administrative/operational matters.

V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs a variety of duties in a clinical setting including sitting/walking at will, lifting/carrying objects weighing up to 25 pounds, bending/crouching/kneeling, reaching, close/far vision, color/depth perception, hearing sounds/communication, and handling/grasping/fingering objects.

Incumbent occasionally works extended hours and travels out of town for training and meetings.

APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Nurse Practitioner/Advanced Practice Nurse for the Monroe County Health Department's ~~Future's Family Planning Clinic~~ **Clinical Services and Case Management** describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined?

Yes No

Applicant/Employee Signature

Date _____

Type or Print Name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor Signature

Date

JOB CLASSIFICATION REVIEW FORM

County of Monroe, Indiana

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• **Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR**

Job title Nurse Practitioner

Fund-Account-
Location 8126/8150-10071-9624

Department Health

Date 04/30/2024

☒ Full-time ☐ Part-time ☒ Exempt ☐ Non-exempt

Current Classification SO Requested Classification SO

Current pay \$ 50.63 per hr Proposed pay \$ _____ per _____

Employee(s) in this position: (attach supplemental sheet if necessary)

Emma Rice

TYPE OF ACTION REQUESTED

- ☐ Create position ☐ Abolish position ☐ Seniority review
☐ Qualifications requirements review ☐ Pay policy application/interpretation issues
☐ Reclassification due to change in duties, responsibilities, work conditions, etc.
☒ Other *Please describe:*

Questions 1 through 3 to be completed jointly by the employee and/or Elected Official/Department Head initiating the review

1. Describe why this new position/added employee/classification review is necessary.

update job description and department reporting structures

2. Have you previously requested this new position/added employee/reclassification of this existing position? ☐ yes ☒ no

If yes, describe date and outcome of that request:

3. If this is a request for classification review of an existing position, review the current job description and make any revisions that are necessary to describe the job being performed. *Attach a copy of the existing job description with your revisions marked with **Bold Red** for additions and ~~Strikethrough~~ for deletions.*

Do these revisions constitute *additional* duties and responsibilities since the adoption of the existing job description? ☐ yes ☒ no

If not, explain why the existing description is no longer accurate:

Questions 4 through 8 to be completed by Elected Official/Department Head
--

4. Are the job functions described on this form currently being performed by your office/department? ☒ yes ☐ no If yes, name those job title(s) and classifications:

Job title Nurse Practitioner *Classification SO

Job title _____ *Classification _____

Job title _____ *Classification _____

** Current classification of position may be impacted by the creation of or reclassification of another position.*

5. Is this request a result of new legislation, a mandate, or litigation? ☐ yes ☒ no
If yes, specify statute citation and/or case:

6. Is this request based on increased volume of work? ☐ yes ☒ no If yes, please explain:

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? ☐ *yes* ☐ *no* If *yes*, please describe, including estimated costs:

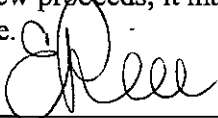
8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

By maintaining up to date job descriptions

AUTHORIZATION BY EMPLOYEE:

Signature of employee(s) assigned to the position being considered for reclassification.

I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.



Employee signature

04/30/2024

Date

Employee signature

Date

Employee signature

Date

Employee signature

Date

AUTHORIZATION BY APPOINTING AUTHORITY:

Signature required by Elected Official/Department Head

I have reviewed this reclassification request with the employee(s), and ☒ *agree* ☐ *disagree*.
If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

Lori Kelley

04/29/2024

Signature of Elected Official/Department Head

Date

Name typed or printed

Lori Kelley

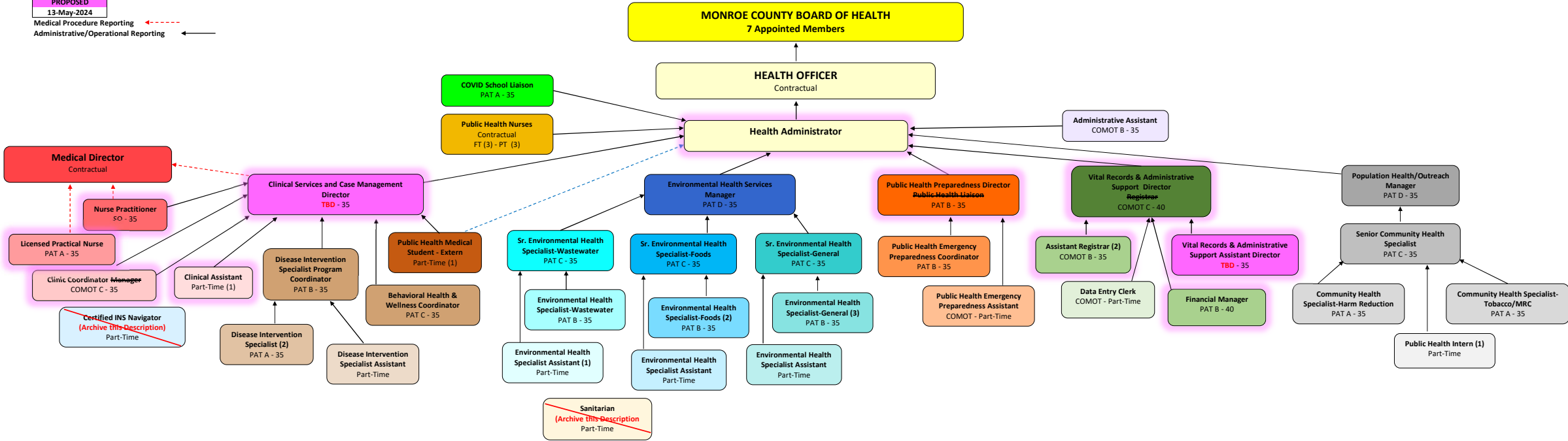
Type or Print Name

PROPOSED

13-May-2024

Medical Procedure Reporting

Administrative/Operational Reporting





PERSONNEL ADMINISTRATION COMMITTEE

Monroe County Courthouse, Room 306
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Peter Iversen
Marty Hawk
Geoff McKim

PERSONNEL ADMINISTRATION COMMITTEE SUMMARY MINUTES Tuesday, April 2, 2024 at 12:00 PM (Noon) HR-Council Conference Room and Teams Connection

MEMBERS

Present – **IN PERSON** – Peter Iversen
Present – **IN PERSON** – Marty Hawk
Present – **IN PERSON** – Geoff McKim

STAFF

Present – **IN PERSON** – Kim Shell, Council Administrator
Present – **VIRTUAL** – Molly Turner-King, Legal Counsel
Present – **IN PERSON** – E Sensenstein, Personnel Administrator
Present – **IN PERSON** – Courtney Moser, Assistant Council Administrator

1. CALL TO ORDER – 12:02 pm

McKim called the meeting of the Personnel Administration Committee to order at 12:02 pm on Tuesday, April 2, 2024. Shell noted for the record that Councilors McKim, Iversen, and Hawk were present in person in the HR-Council Conference Room.

2. ADOPTION OF AGENDA – 12:02 pm

No changes.

3. RE-ELECTION OF OFFICER – 12:03 pm

McKim nominated Iversen as Chair. Hawk seconded. Iversen accepted the nomination.

Shell called the Roll.

Hawk Yes

McKim Yes

Iversen Yes

Motion passed 3-0; Unanimous.

4. ASSESSOR'S OFFICE – 12:03 pm

Review of WIS Recommendations

Assistant Administrator to the PTABOA Level 2 (*formerly Administrative Assistant to PTABOA*)

Administrator to the PTABOA Level 3 (*formerly Administrative Assistant to PTABOA*)

GIS Assessment Administrator (New Position)

GIS Assessment Specialist

Sales Disclosure Specialist

Market Data Analysis Administrator (*formerly titled Sales Disclosure Supervisor*)

Property Director (*formerly titled Reassessment Property Specialist Supervisor*)

Assistant Property Director (New Position)

Real Estate Reassessment Specialist

Personal Property Specialist Supervisor

Personal Property Assessment Specialist

Floating Assessor Specialist (New Position)

Judy Sharp, Assessor and Lisa Surface, Chief Deputy Assessor, presented. Sharp reviewed the WIS descriptions and memo. She disagreed with some of the recommendations, noting that the Auditor's Office personnel are PATs and Assessor's personnel are COMOTs. She commented that she has lost employees to the Auditor's Office.

Two positions that the Assessor believed were still not correctly classified were the following:

1) Property Director should be a PAT D, the same as the Auditor's Office. Sharp would like for this to be in parity with the Auditor Property Director.

2) GIS Assessment Administrator should be a PAT B, the same as the Auditor's Office. Sharp would like for this to be in parity with the Auditor's GIS Customer Service Representative.

A discussion took place with regards to the provided WIS information comparing counties such as Porter, Hamilton, and Tippecanoe in how the various assessor positions are paid.

Sharp requested that all Assessor employees move to a 40-hour work week.

Sharp requested that both PTABOA positions be classified at a PAT B and the Market Data Analysis Administrator PAT A.

Sharp stated that the job descriptions accurately reflected the work performed in the department.

McKim, stated that he was persuaded by the need for parallelism, and made the motion to forward to Council as follows:

Property Director – PAT D

PTABOA Administrators – PAT B

GIS Specialist – PAT B

Market Data Analysis Administrator – PAT A

Sales Disclosure Specialist – COMOT C

Assistant Property Director – COMOT D

Real Estate Reassessment Specialist – COMOT C

Personal Property Specialist Supervisor – COMOT D

Floating Assessor Specialist – COMOT C

Personal Property Assessment Specialist – COMOT C

Hawk seconded.

Further discussion ensued.

Iversen asked for a Voice Vote on McKim's motion.
Motion passed 3-0; Unanimous.

Hawk made a motion to forward to Council with a positive recommendation for 40 hours. McKim seconded.

No further discussion.

Iversen asked for a Voice Vote on Hawk's motion.
Motion passed 3-0; Unanimous.

5. **APPROVAL OF SUMMARY MINUTES AS PRESENTED – 12:53 pm**
-February 6, 2024

Hawk requested the February's minutes regarding the Health Department, be amended that in regarding job descriptions, it is important to discuss the complexity of the job, not the amount of work.

Iversen asked for a Voice Vote on the approval of the summary minutes including Hawk's amendment.
Motion passed 3-0; Unanimous.

6. **ADJOURNMENT – 12:57 pm**

The Summary Minutes of the Personnel Administration Committee (PAC) held on **April 2, 2024** were presented and approved on **May 13, 2024**.

PERSONNEL ADMINISTRATION COMMITTEE

☐ Aye ☐ Nay ☐ Abstain ☐ Not Present _____
Peter Iversen, Chair

☐ Aye ☐ Nay ☐ Abstain ☐ Not Present _____
Marty Hawk, PAC Member

☐ Aye ☐ Nay ☐ Abstain ☐ Not Present _____
Geoff McKim, PAC Member

ATTEST:

Brienne Gregory, Auditor
Monroe County, Indiana

Date