

CIVIL SERVICE DEPARTMENT
REQUEST FOR CIVIL SERVICE COMMISSION ACTION GUIDELINES

**REQUEST FOR TEMPORARY REASSIGNMENT AND TRANSFER
FOR REHABILITATION AND/OR TRAINING**

Civil Service Rules and Regulations Section 63 (5)
Civil Service Rules and Regulations Section 64

Form to be completed by: **Stacey Lewis, Director-HR, Harbor Department**
Name/Title/Department

Date: **1-27-20**

Section1: *To be completed by department.*

Civil Service Dept.
Verification

A requisition is required. The requisition number is: **FM19-019. Date Received: 1/8/19**

CP

The requisition has been received in the Civil Service Department.

A request for transfer must be included in the request to Commission if the appointee will move between departments. Is a transfer necessary? **Yes. The employee will be transferring from the Harbor Department to the Financial Management Department.**

CP

Have all required documents been submitted to the Civil Service Department?

- Completed Training Program Outline
- Employee Consent Form

CP
CP

Section 2: *Points to be addressed.*

Formal name and current classification title of employee.

Name: **Diana Alonso**

Class Title: **Special Services Officer II,
Unarmed**

CP

Summary of employee's work history, specifying all classification titles and dates, including date(s) permanent status was attained in each classification.

CP

Title: **Special Services Officer II**

Hire Date: **April 23, 2002**

Permanent Status Date: **April 22, 2003**

Date of Injury: **Non-occupational injury.**

CP

Date of Permanent Medical Restrictions: **May 2, 2018**

Analysis between the candidate's current class specification and the reassignment class specification to determine the minimum qualifications are comparable.

CP

Department's explanation of the interactive process and summary of the department's training program, intent of program, goals, objectives, methods, time and criteria.

CP

Length of training requested: **3 months.**

(For training longer than 1 year, the initial request should indicate the overall estimated length of program. A new request and plan must be resubmitted each year for evaluation and Commission approval.)

CP

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Department's confirmation that employee will meet the criteria upon successful completion of training program.	CP
Employee was contacted about conditions of temporary reassignment for rehabilitation and/or training.	CP
<p>The following should be in attendance at the Civil Service Commission meeting:</p> <ul style="list-style-type: none"> • Requesting department. • Any other impacted departments. • Not required for the employee 	CP
<p>SUGGESTED ACTION:</p> <p>Staff recommends approval of the request in accordance with Article VI, Sections 63(5) and 64 of the Civil Service Rules and Regulations. Ayisha Thompson, Occupational Health Human Resources Officer concurs that this position complies with Ms. Alonso's work restrictions.</p> <p>Staff has reviewed the request form and all documents attached. Ms. Alonso will complete a three-month training period and upon satisfactory completion this program, the Department will seek Civil Service Commission approval of Ms. Alonso's permanent appointment to the position of Customer Services Representative II – Parking Citations. A comparative analysis between the candidate's current class specification and the reassignment class specification was completed. Ms. Alonso can be reasonable expected to physically perform the duties of the Customer Service Representative II- Parking Citations position in the Financial Management Department.</p> <p>Ms. Alonso has been notified of the conditions of the temporary reassignment and transfer for retraining, and that this reassignment and transfer will be an item on the Commission agenda for February 5, 2020. A representative from the Harbor Department will be present at the Commission meeting.</p>	



Date: January 28, 2020
To: Civil Service Commission
From: *Sandy Wits for* Stacey V. Lewis, CHRO/Director of Human Resources, SPHR, SHRM-SCP, IPMA-SCP
Subject: **REQUEST FOR TEMPORARY REASSIGNMENT AND TRANSFER FOR REHABILITATION AND/OR TRAINING OF DIANA ALONSO, SPECIAL SERVICES OFFICER II UNARMED TO FINANCIAL MANAGEMENT**

REQUEST:

The Harbor Department is requesting a temporary reassignment for rehabilitation and/or training and transfer of Ms. Diana Alonso, Special Services Officer II-Unarmed, Security Division, to the position of Customer Service Representative II- Parking Citations. This is for the purpose of training and development, in accordance with **Article VI, Section 63(5) and 64 of the Civil Service Rules and Regulations.**

EMPLOYMENT HISTORY:

Ms. Diana Alonso was hired on April 23, 2002, by the Police Department, as a Special Services Officer II. She accepted a position with the Harbor Department on February 21, 2004 and maintains a permanent/full-time status as a Special Services Officer II.

PERMANENT RESTRICTIONS AND REASSIGNMENT FOR TRAINING AND/OR REHABILITATION REQUEST:

On May 2, 2018, Ms. Alonso's treating physician provided permanent work restrictions which disallowed her from performing the essential functions of her job as a Special Service Officer for the Harbor Department's Security Division. In accordance with the Fair Employment and Housing Act (FEHA), the Harbor Department conducted the Interactive Process and sought alternative opportunities that could possibly accommodate her permanent restrictions.

While Ms. Alonso served on a transitional duty assignment with the Financial Management Department, which began during September, 2019, the Financial Management Department identified a vacant position of Customer Service Representative II – Parking Citations. It is believed Ms. Alonso would be successful after training by May 1, 2020.

The Financial Management Department has informed Ms. Alonso that the Reassignment for Training and/or Rehabilitation parameters are as follows:

- This is a temporary assignment and **does not guarantee** permanent placement in the Customer Service Representative II – Parking Citations.

- Ms. Alonso will have participate in a **three (3) month training program**.
- Ms. Alonso **will not** accrue any status in Customer Service Representative II.
- Ms. Alonso's salary will remain that of her current classification as a Special Service Officer II-Unarmed.

Upon satisfactory completion of the three (3) month training period, the Financial Management Department will seek Civil Service Commission approval of Ms. Alonso's appointment to the position. Upon approval by the Commission, Ms. Alonso will be reclassified as a Customer Service Representative II. Ms. Alonso has been made aware that the change in classification will create a reduction in salary and initiate a new probationary period

If you have questions, please contact me at (562) 283-7500.

Attachments: Reassignment for Training Program –Plan Outline
Employee Consent Form & Employee Statement of Qualifications
Request for Temporary Reassignment for Training

cc: Ayisha Thompson, Human Resources - Occupational Health AO
Michelle Hamilton, Human Resources - City HR Benefits AO
Amanda Hall, Manager, Commercial Services – Financial Management
Sandra Kennedy, Administrative Officer – Financial Management
Personnel Medical File



Long Beach Civil Service Commission

REASSIGNMENT FOR TRAINING PROGRAM

Training Plan Outline

NAME OF PARTICIPANT:	Diana G. Alonso	DATE:	01/23/2020
SOCIAL SECURITY NUMBER:	[REDACTED]		
DESIRED BEGINNING DATE:			
TITLE OF TRAINING CLASSIFICATION:	Customer Service Representative II		

1. Goals and Objectives (must encompass the most substantive duties, attach additional sheets if necessary): **See attached**

2. Training Methods:

- Shadowing current staff to observe duties and work routines
- Hands-on training with staff
- Hard copy and on-line reference and training materials

3. Criteria to Measure Satisfactory Completion of Training Plan:

- Training will be monitored by the section lead and supervisor
- Monthly progress reports to be presented to bureau manager and Ms. Alonso
- Utilization of system reports (e.g. CSQ Call Center, CPC)

4. Projected term of training assignment: **Three (3) months**

5. Signature of Trainee: [Signature] Date: 1/27/2020

By my signature, I have read this Training Plan and understand it.

Assignment successfully completed? YES ☐ NO ☐

Assignment terminated? YES ☐ NO ☐ If "yes" please explain below.

Immediate Supervisor

Bureau/Division Manager

Overview of Parking Citations Customer Service Representative Duties

- Interacting and providing accurate and exceptional customer service in-person, via phone, email, and written correspondence for:
 - Citation questions
 - Payment Plans
 - Appeals
 - Preferential Parking
- Receiving and issuing written and e-mail correspondence with customers and issuing agencies
- Processing applications for Preferential Parking permits
- Processing claims for release of liability, rentals, and stolen vehicles
- Billing services for Parking Citations and Towing Fee Payment Plans
- Scheduling administrative hearings
- Billing services/research for unbilled citations and make mismatches
- Scanning of returned parking citation notices
- Data entry of handwritten citations
- Scanning of handwritten citations



Long Beach Civil Service Commission

REASSIGNMENT FOR TRAINING PROGRAM

Statement of Qualifications

NAME OF PARTICIPANT: <u>Diana G. Alonso</u>	DATE: <u>12-18-19</u>
PRESENT JOB TITLE: <u>Special Services Ofcr.</u>	
SOCIAL SECURITY NUMBER: <u>[REDACTED]</u>	
REASSIGNMENT FOR TRAINING TO THE DUTIES OF: <u>Customer Service Rep.</u>	

INSTRUCTIONS: The information you provide will be used to insure that you will meet the minimum requirements for the job when you complete your training assignment. Please answer the questions below as fully as possible, showing all experience or education you have had which will help you to meet the minimum requirements shown on the attached sheet (attach additional sheets if necessary.)

1. Please list any courses, degrees or training programs completed which have prepared you for the job in which to train. Be sure to include the name of the school or organization, dates and duration, as appropriate. Working For The Port Of Long Beach for 15 1/2 years as a Special Services Ofcr. Dealing with Customers, And The Public. Interacting with Customers, And City Departments by Phone, Email, and In Person. Answering the Main Switchboard for The Port, And Directing People To The Appropriate Depts. Coordinating Meetings For Port Board Meetings, And Bid Specs. worked with The City of Long Beach issuing citations, Taking Tow Reports & Tow Sheets.
2. Please list any experience you have had which has prepared you for the job in which you wish to train. Be sure to include employer, dates employed and number of months or years employed. Currently working As A Customer Service Rep. For Parking Citations. Answering phones, Interacting with Customers in-person, via phone, email. Scanning citations, processing Contesting of Citations. Data Entry of Handwritten Citations, and Processing Applications for Preferential Parking Permits. Process Payments of Citations, make changes, Resolves problems of The Public Related To Parking Citations, Delinquency Notices, And DMV File Discrepancies.



Long Beach Civil Service Commission

REASSIGNMENT FOR TRAINING PROGRAM**Employee Consent Form**

I, the undersigned, am aware that the Diana Alonso Department is requesting authorization from the Long Beach Civil Service Commission to temporarily assign me to perform the duties of the Customer Service Rep classification. I understand the proposed reassignment, pursuant to Civil Service Rules and Regulations, Section 63(3), is for training and development purposes only, and will, if approved, be effective for a period of no more than one year.

I further understand that:

1. Completion of the proposed training will not, by itself, be considered sufficient justification for my transfer into the subject classification, nor will it insure that I pass the Civil Service examination, or be appointed to the classification.
2. During the period of reassignment for training purposes, I will neither gain nor accrue Civil Service seniority in the subject classification. Seniority will continue to accrue in my permanent classification.
3. During the period of reassignment, I will continue to be compensated within the salary range of my permanent classification.

Having read and understood the above, I do hereby give my consent to be temporarily reassigned for training purposes to perform the duties of the classification.

D. Alonso
Signature

12-16-19
Date



TITLE: CUSTOMER SERVICE REPRESENTATIVE I - III

DEFINITION: Under general supervision, performs tasks associated with the billing and collection of fees for City services.

DISTINGUISHING CHARACTERISTICS:

- Grade Level I - Performs the entry-level and/or routine duties of the classification.
- Grade Level II - Performs the journey-level duties of the classification.
- Grade Level III - Performs the complex duties of the classification and independently resolves problems related to issues not addressed in written policies and procedures.

EXAMPLES OF DUTIES:

CUSTOMER SERVICE REPRESENTATIVE I:

- Operates CRT's, typewriters, mail opening machines, and other related equipment;
- Accesses account/permit/license/citation transaction information via CRT terminal;
- Receives, opens and routes mail containing utility/City service/business license/parking citation payments;
- Receives problems of the public related to parking citations, delinquency notices and DMV file discrepancies;
- Obtains data and information from field personnel;
- Files records, documents, reports, and correspondence;
- May interact with customers and City departments by phone, mail, and in person in processing account/permit/license/citation transactions;
- Performs other duties as required.

CUSTOMER SERVICE REPRESENTATIVE II:

- Performs the duties of the Customer Service Representative I level;
- Regularly interacts with customers and/or City departments by phone, mail, or in person in finalizing account/permit/license/citation transactions;
- Operates remittance processors, money counting machines, electronic cash registers, and other related equipment;
- Enters account/permit/license/citation information via CRT terminal;
- Resolves problems of the public related to parking citations, meter rereads, delinquency notices, and DMV file discrepancies;
- Receives payments, makes change and issues receipts;
- Initiates billing for City services;
- Performs collection efforts on delinquent accounts for City services and damage to City property;
- Maintains utility meter and refuse records and accounts;
- Coordinates work orders, new service requests, and turn-on/turn-off of utilities with client departments;

**CITY OF LONG BEACH
CLASSIFICATION SPECIFICATION**

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CUSTOMER SERVICE REPRESENTATIVE I-III (Continued):

- Issues licenses, refunds, notices and other related documents and information;
- Performs meter rereads and solves meter access problems;
- Performs other duties as required.

CUSTOMER SERVICE REPRESENTATIVE III:

- Performs the duties of the Customer Service Representative II level;
- Interacts with customers and/or City departments in resolving problems relating to account/permit/license/citation transactions;
- Formats account/permit/license/citation transactions via CRT terminal;
- Prepares documents for recording, transmitting and accounting of all funds received;
- Maintains daily balances of revolving funds;
- Dispositions delinquent accounts for City services and damages to City property;
- Monitors, corrects and transfers customer payment information via CRT terminal to host computer;
- Initiates and carries out Small Claims Court actions;
- Coordinates scheduling, routing and data entry of meter information;
- Processes work order, new service requests, turn-on/turn-off of utilities, and follows through with customer scheduling and account transactions;
- Researches records, accounts, files, rates, and prepares appropriate correspondence and reports;
- Calculates and processes claims on bankrupt and deceased creditors;
- May operate computers and other related equipment;
- Performs other duties as required.

MINIMUM REQUIREMENTS:

Six months of recent clerical, cashiering, data entry, or customer service experience or training;

Ability to perform simple mathematics calculations;

Skill in the operation of electronic/mechanical equipment;

Ability to exercise tact, judgment and patience in assisting the public and client departments;

Ability to work shifts, weekends and overtime as required.

HISTORY:

Created 09/01/84 by consolidating Service Representative, Communication Operator and Cashier classifications; revised 10/18/89

Approval/Adoption Dates: 10/18/89 - Human Resources Department
11/01/89 - Civil Service Commission