

**Memorandum**

Date: October 11, 2023

To: Civil Service Commission

From: Salvador Barajas, Personnel Analyst

Subject: **REQUEST FOR EXTENSION OF PROBATIONARY PERIOD FOR CAROLINA FERNANDES, PAYROLL/PERSONNEL ASSISTANT II**

On September 28, 2023, the Civil Service Department received a request from the Harbor Department for an Extension of the Probationary Period for Carolina Fernandes, Payroll/Personnel Assistant II, in accordance with Article V, Section 41(2) of the Civil Service Rules and Regulations and Section 1.01 B (2) of the Civil Service Policies and Procedures.

Facts for Consideration

- On March 27, 2023, Ms. Fernandes was hired by the Harbor Department as a Payroll/Personnel Assistant II.
- The Payroll/Personnel Assistant II classification requires the processing of payroll and personnel transactions, preparing documentation for all on-boarding and off-boarding staff, personnel requisitions, support documentation, and utilizing the Harbor Department's Time Recording System.
- During her initial probationary period, Ms. Fernandes lacked direct supervision and guidance on the technical aspects of the City's payroll. This was a result of the Department lacking lead staff in the payroll system. Although Ms. Fernandes gained a baseline understanding of the duties from another peer, the lack of direct supervision has prevented her from completing difficult and tedious tasks that have impacted the Department's employees' pay and other personnel matters.
- Ms. Fernandes is continuing to learn the duties and requires additional support and development in certain areas related to the position, HRMS, and other payroll systems.



- Ms. Fernandes' probationary period is scheduled to conclude on or around 10/25/2023.
- As of the last pay period ending September 22, 2023, Ms. Fernandes had completed 863 probationary hours, leaving her with 181 hours before reaching 1044 hours.
- The Harbor Department is requesting a 90-day (522-hour) extension beyond Ms. Fernandes' probationary period of 1,044 hours. Section 41(2) of Civil Service Rules and Regulations states "Extensions of the probationary period may be granted by the Commission in three months or 522 scheduled work hour increments but shall in no instance exceed six months or 1044 scheduled work hours of extended probationary time."
- The chart below outlines Ms. Fernandes' current hours expended as of September 22, 2023, and the extension requested.

Employee Name	Current Hours	Hours Left before 1044	Original Hire Date	Anniversary Date	Extension Requested
Fernandes, Carolina	863	181	03/27/2023	10/25/2023	522 hours

- Granting the extension of probation would allow Ms. Fernandes to receive continued guidance, training, and feedback, to address the areas of improvement and to effectively demonstrate proficiency within the full scope of the Payroll/ Personnel duties. The Assistant Director and Manager will work closely with Ms. Fernandes to track assignments and tasks on a weekly basis. In addition, the Administrative Analyst II will provide guidance to Ms. Fernandes due to the nature of the Harbor Department's large workforce, schedules, and transactions.

Recommendation:

Staff recommends approval of the extension of Ms. Fernandes probationary period in accordance with Article V, Section 41(2) of the Civil Service Rules and Regulations and Section 1.01 B (2) of the Civil Service Policies and Procedures.

The Harbor Department and Ms. Fernandes have been notified that this request will be on the Commission's agenda. A representative from the department is present for any questions the Commission may have.

Memorandum

Date: September 28, 2023
To: Civil Service Commission
From: Sandy Witz, Director of Human Resources *(Dw) on behalf of*
Subject: **REQUEST FOR PROBATIONARY PERIOD EXTENSION – CAROLINA FERNANDES, PAYROLL/PERSONNEL ASSISTANT II**

The Human Resources Division respectfully requests a probationary period extension for Carolina Fernandes, Payroll/Personnel Assistant II. An extension of 90 days is being recommended, to provide Ms. Fernandez the opportunity to further develop her skills and become acclimated to the duties of the position. This request is made in accordance with Civil Service Rules and Regulations Sections 41 (2) and Civil Service Commission Policy Section 1.01 (B)(2).

Ms. Fernandez was hired on March 27, 2023, as a Payroll/Personnel Assistant II. During her initial probationary period. The duties require processing payroll and personnel transactions, preparing documentation for all on-boarding and off-boarding transactions, Personnel Requisitions and support documentation, and utilizing the City's Human Resources Management System (HRMS) and LifeView, and the Harbor Department's Time Recording System.

Ms. Fernandes is continuing to learn the full scope of duties and requires additional support and development in areas related to the position, to include utilizing the use of HRMS system and other facets of payroll transactions for the Harbor Department. A lack of direct supervision on more technical aspects of the City's payroll systems and one on one guidance of challenging duties was not available due to the lack of a lead in the payroll section. Ms. Fernandes has gained a baseline understanding of the duties, in part by another Payroll/Personnel Assistant, who had been with the Department for one year and has since promoted to another City Department in August. The lack of direct supervision has also attributed to Ms. Fernandes leaving out key payroll tasks that are difficult and tedious, causing a loss of productivity, quality of work, and delay in submitting vital personnel information resulting in last minute rushes or corrections that have impacted employees pay and other personnel matters.

Extending Ms. Fernandes' probationary period will allow the necessary time and support to address areas of improvement, as well as permit her to effectively demonstrate job proficiency. Training in the HRMS and other systems will be conducted throughout the extension, including tracking of assignments and tasks on a weekly basis by the Assistant Director and Manager. Additionally, an Administrative Analyst III will provide guidance due to the nature of the Harbor Department's large number of employees, various work schedules, volume of transactions, and types of holiday schedules.

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It is requested that an extension be granted for an additional 90 days (522 scheduled hours) to provide an opportunity for Ms. Fernandes to receive continued guidance,

training, and feedback, to enhance her performance to the full scope of the Payroll/Personnel Assistant II duties.

Thank you for your consideration of this request. If you have any further questions or require additional information, please contact me or my staff at (562) 283-7530.

CIVIL SERVICE DEPARTMENT
REQUEST FOR CIVIL SERVICE COMMISSION ACTION GUIDELINES

REQUEST FOR EXTENSION OF PROBATION

Civil Service Rules and Regulations	Section 41 (2)
Civil Service Commission Policy	Section 1.01

Form completed by: _____ Date: _____
Name/Title/Department

Section 1: <i>To be completed by requesting department.</i>	To be completed by department	Civil Service Dept. Verification
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A requisition is not required.

Is any other department impacted?
If yes, which department: _____

A completed Employee Performance Evaluation is required. Has the form been received in the Civil Service Department?

Section 2: Points to be addressed in request:

Formal name and current classification title of employee.

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

SEE ATTACHED

The date the employee will complete probation. Date: _____
Request must be submitted 30 days prior to completion of probation.

A statement of the problem and specific reasons for request. Rationale as to how/why an extension will allow employee to pass probation.

SEE ATTACHED

Which policy criteria is being utilized and how the request meets the criteria required in the policy.

SEE ATTACHED

Length of extension requested. **90 days (522 hours)**

(A maximum extension of 3 months may be requested; a second 3- month extension may be requested at a later date, if necessary.)

SB

The following should be in attendance at the Civil Service Commission meeting:

- Requesting department.
- The impacted employee's attendance is optional.

SB

Representative from Harbor Department's Human Resources Division will be in attendance.

Notes:

SUGGESTED ACTION: