



Department of Employee Relations

October 21, 2016

Tom Barrett
Mayor

Maria Monteagudo
Director

Michael Brady
Employee Benefits Director

Deborah Ford
Labor Negotiator

To the Honorable
The Committee on Finance and Personnel
Common Council
City of Milwaukee

Dear Committee Members:

Re: Common Council File Number **160706**

The following classification and pay recommendations will be submitted to the City Service Commission on **October 25, 2016**. We recommend these changes subject to approval by the City Service Commission.

In the City Attorney's Office,

One position of Docketing Specialist, PR 6NN is recommended for reclassification to Docketing Specialist-Senior, PR 6ON.

One position of Legal Office Assistant, PR 6JN is recommended for reclassification to Docketing Specialist, PR 6NN.

The job evaluation reports covering the above positions, including the necessary Salary and Positions Ordinance amendments, is attached.

Sincerely,



Maria Monteagudo
Employee Relations Director

MM:fcw

Attachments: Job Evaluation Report
Fiscal Note

C: Mark Nicolini, Dennis Yaccarino, John Ledvina, Nicole Fleck, Molly King, Grant Langley, Miriam Horwitz,
Amy Hefter and Linda Beckham



Job Evaluation Report

City Service Commission Meeting: October 25, 2016

CITY ATTORNEY

Current	Request	Recommendation
Docketing Specialist PR 6NN (\$45,013 - \$51,547)	Docketing Specialist – Senior PR 6ON (\$49,344 - \$56,340)	Docketing Specialist – Senior PR 6ON (\$49,344 - \$56,340)
Legal Office Assistant PR 6JN (\$39,611 - \$44,546)	Docketing Specialist PR 6NN (\$45,013 - \$51,547)	Docketing Specialist PR 6NN (\$45,013 - \$51,547)

Action Required

In the Salary Ordinance, under Pay Range 6ON, add the title "Docketing Specialist – Senior".

In the Positions Ordinance, under City Attorney's Office, Administrative Division, delete one position of "Legal Office Assistant", and under the Docket Unit, add one position of "Docketing Specialist – Senior".

Background

City Attorney Grant Langley has requested the reclassification of a vacant Legal Office Assistant to Docketing Specialist based upon the volume of docketing related work. Also requested is the reclassification of a current Docketing Specialist to a new title of Docketing Specialist – Senior in recognition of the position's lead role in relation to the new Docketing Specialist, and in instructing all attorneys and support staff in the use and procedures of the Prolaw case management software and eDOCS document management system. The City Attorney has indicated that these reclassifications are requested to allow for timely performance of legal services and docketing within the office. Current job descriptions were reviewed and staff discussed the positions with Amy Heffer, Special Assistant to the City Attorney.

Current:	Legal Office Assistant	PR 6JN (\$39,611 - \$44,546)
Recommendation:	Docketing Specialist	PR 6NN (\$45,013 - \$51,547)

The City Attorney's Office has requested that a vacant Legal Office Assistant be reclassified to a Docketing Specialist based on the volume of docketing related work within the office. The basic function of this position would be responsibility for classifying, entering, and tracking all court and administrative cases in the City Attorney's case/matter management software and docketing/indexing relevant documents, distributing daily and other calendars, creating and running reports for court and administrative cases as requested by the Common Council, closing and filing all court and administrative cases, identifying potential conflicts of interest in representation, and coordinating records retention. Day-to-day task management and workflow direction would be provided by the proposed Docketing Specialist-Senior. Duties and responsibilities would include:

- 50% Docketing - reviewing documents and opening hard files as electronic case management entries are made of necessary information for tracking, calendaring, and monitoring; identifying potential conflicts of interest; researching court and agency requirements for deadlines, hearings, depositions, and appointments; advising staff on data entry requirements; and directing docketing activities related to legal services (opinion, advice, document drafting and research requests).

- 25% Maintaining Case Management System - creating and maintaining docket types and categories; administering security/ID access for attorneys and staff and for system features and functions; creating queries and report templates; and daily monitoring for data corruption and other errors.
- 20% Record Retention - coordinating the closing of files (hard as well as electronic copies and original documents including pleadings, motions, briefs, memoranda and exhibits), boxing, transporting, storage and retrieval.
- 5% General Office Functions - participating in general office functions including staff meetings.

These duties and responsibilities are consistent with the current classification of Docketing Specialist. We therefore recommend this position of Legal Office Assistant in Pay Range 6JN (\$39,611 - \$44,546) be reclassified to Docketing Specialist in Pay Range 6NN (\$45,013 - \$51,547).

Current:	Docketing Specialist	PR 6NN (\$45,013 - \$51,547)
Recommendation:	Docketing Specialist – Senior	PR 6ON (\$49,344 - \$56,340)

The City Attorney's Office has requested that the current Docketing Specialist be reclassified based upon an increased level of responsibility in training all attorneys and support staff in the use and procedures for the Prolaw case management and eDOCS document management systems. This position has oversight of other staff with respect to electronic workflow, generation of regular reports to management regarding case status, volume, and workload and creation of customized reports related to internal and external information requests. This position would also provide day-to-day task management and workflow direction for the proposed new Docketing Specialist. Duties and responsibilities would include:

- 35% Docketing - reviewing documents and opening hard files as electronic case management entries are made of necessary information for tracking, calendaring, and monitoring; identifying potential conflicts of interest; researching court and agency requirements for deadlines, hearings, depositions, and appointments; advising staff on data entry requirements; and overseeing docketing activities related to legal services (opinion, advice, document drafting and research requests).
- 25% Maintaining Case Management System - creating and maintaining docket types and categories; administering security/ID access for attorneys and staff and for system features and functions; creating queries and report templates; and daily monitoring for data corruption and other errors.
- 15% Record Retention - coordinating the closing of files (hard as well as electronic copies and original documents including pleadings, motions, briefs, memoranda and exhibits), boxing, transporting, storage and retrieval.
- 10% Oversight of Workflow - responsible for the day-to-day task management and workflow direction of the Docketing Specialist.
- 10% Case Management System – working on the Case Management System process improvement and statistical analysis of all legal matters.
- 5% General Office Functions - participating in general office functions including staff meetings.

This position of Docketing Specialist was last studied in 2015 when it was recommended and approved to be reallocated from Pay Range 6KN (\$38,629 - \$45,391) to Pay Range 6NN (\$45,013 - \$51,547) based on a greater responsibility for training and coordinating of docketing, case management, and records retention. It was noted that the position may assist anyone in the Department with the usage of the "Prolaw" system and that the employee had

created written instructions for specific areas. The position also had developed new methods to retrieve records quickly and accurately to respond to an increasing number of requests for public records.

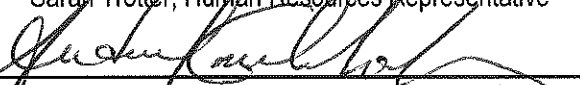
Since that study this position now provides training to all attorneys and office staff on usage and procedures related to the "Prolaw" case management and eDOCS document management systems. The position also provides oversight to staff in relation to electronic workflow; and generation and creation of regular and customized reports to respond to internal and external requests for information. The City Attorney's Office has requested a reclassification of one position of Legal Office Assistant to Docketing Specialist to help with the volume of work in the Docket Unit. This current position of Docketing Specialist will serve as a leadworker to the position.

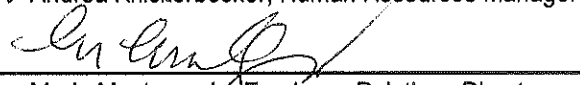
With these changes in mind comparisons were made to other City positions including the classification of Municipal Court Clerk II in Pay Range 6ON (\$49,344 - \$56,340). The basic function of this position is to perform office duties related to courtroom proceedings and operations; and serve as a leadworker to the eight positions of Municipal Court Clerk I. Duties and responsibilities include attending court sessions and entering information related to the outcome of the court proceedings in the case management information system; reviewing incoming correspondence, processing with appropriate response or forwarding to the judge for further review; obtaining information from third-party systems; processing incoming bankruptcy filings; and assigning and monitoring work assignments, reviewing time-off requests for adequate staff coverage, and maintaining the court clerk manual.

Both of these positions need to be able to accurately enter and process legal information and train and oversee the work of others. Although the Municipal Court Clerk II has more positions to oversee, the position under study is also responsible for training and assisting all attorneys and support staff on the usage and procedures related to the "Prolaw" case management and eDOCS document management systems; and to generate regular and customized reports to respond to internal and external requests for information.

We therefore recommend that this position of Docketing Specialist in Pay Range 6NN (\$45,013 - \$51,547) be reclassified to Docketing Specialist – Senior in Pay Range 6ON (\$49,344 - \$56,340).

Prepared by: 
Sarah Trotter, Human Resources Representative

Reviewed by: 
Andrea Knickerbocker, Human Resources Manager

Reviewed by: 
Maria Monteagudo, Employee Relations Director



City of Milwaukee Fiscal Impact Statement

A	
Date 10/21/16	File Number 160706
Subject Classification and pay recommendations approved by the City Service Commission on October 25, 2016.	

B	
Submitted By (Name/Title/Dept./Ext.)	Sarah Trotter, Human Resources Representative Dept. of Employee Relations/X2398.

C	
This File	<input checked="" type="checkbox"/> Increases or decreases previously authorized expenditures. <input type="checkbox"/> Suspends expenditure authority. <input type="checkbox"/> Increases or decreases city services. <input type="checkbox"/> Authorizes a department to administer a program affecting the city's fiscal liability. <input type="checkbox"/> Increases or decreases revenue. <input checked="" type="checkbox"/> Requests an amendment to the salary or positions ordinance. <input type="checkbox"/> Authorizes borrowing and related debt service. <input type="checkbox"/> Authorizes contingent borrowing (authority only). <input type="checkbox"/> Authorizes the expenditure of funds not authorized in adopted City Budget.

D	
This Note	<input type="checkbox"/> Was requested by committee chair.

E	
Charge To	<input checked="" type="checkbox"/> Department Account <input type="checkbox"/> Contingent Fund <input type="checkbox"/> Capital Projects Fund <input type="checkbox"/> Special Purpose Accounts <input type="checkbox"/> Debt Service <input type="checkbox"/> Grant & Aid Accounts <input type="checkbox"/> Other (Specify) _____

F

Assumptions used in arriving at fiscal estimate.

G

Purpose	Specify Type/Use	Expenditure	Revenue
Salaries/Wages		See attached spreadsheet.	
Supplies/Materials			
Equipment			
Services			
Other			
TOTALS			

H

For expenditures and revenues which will occur on an annual basis over several years check the appropriate box below and then list each item and dollar amount separately.

1-3 Years 3-5 Years

1-3 Years 3-5 Years

1-3 Years 3-5 Years

I

List any costs not included in Sections E and F above.

J

Additional information.

Department of Employee Relations
Fiscal Note Spreadsheet

Finance and Personnel Committee Meeting of October 26, 2016
City Service Commission Meeting of October 25, 2016

NEW COST FOR 2016											
No. Pos.	Dept	From	PR	To	PR	Present Annual	New Annual	New Cost	Rollup	Total Rollup+ Sal	
1	City Attorney's Office	Docketing Specialist	6NN	Docketing Specialist - Senior	6ON	\$49,476	\$51,950	\$285	\$58	\$344	
1	City Attorney's Office	Legal Office Assistant	6JN	Docketing Specialist	6NN	\$39,611	\$45,013	\$623	\$127	\$751	
2								\$909	\$186	\$1,095	

Assume effective date is Pay Period 25, 2016 (November 20, 2016)

COSTS FOR FULL YEAR											
No. Pos.	Dept	From	PR	To	PR	Present Annual	New Annual	New Cost	Rollup	Total Rollup+ Sal	
1	City Attorney's Office	Docketing Specialist	6NN	Docketing Specialist - Senior	6ON	\$70,827	\$86,189	\$15,362	\$2,612	\$17,974	
1	City Attorney's Office	Legal Office Assistant	6JN	Docketing Specialist	6NN	\$39,611	\$45,013	\$5,402	\$918	\$6,320	
2								\$20,764	\$3,530	\$24,294	

Totals may not be to the exact dollar due to rounding.