



May 25, 2022

Bernard J. Allen Executive Director

David M. Silber, CFA, CAIA
Chief Investment Officer

Melody Johnson Deputy Director

Ms. Kristin Urban
Interim Executive Secretary to the CSC
Department of Employee Relations
200 E. Wells St., Rm 706
Milwaukee, WI 53202-3515

RE: Request for second extension of temporary appointment

Dear Ms. Urban,

I am writing to request an extension of the temporary appointment of Katrina Bailey as a Disability Specialist – Sr. retroactively from June 26, 2022 and ending June 26, 2023.

As mentioned in the November 19, 2021 communication to DER, the ERS has undergone a significant transition in the Disability Section with the retirement of a long service employee. We discovered that an additional position was needed and in the beginning of this year it was determined that a Disability Lead would be necessary. The Lead Disability Specialist would provide needed coordination of the training and coaching of the Disability Specialists, ensuring staff is cognizant and compliant with all changes to local, state, and federal legislation. Further, the Lead would ensure adequate staffing is available for the daily needs of the agency, as well as for the redress of special circumstances. The Lead will regularly meet and report to the Deputy Director Disability. In some special circumstances, which are anticipated to be rare, the Lead will act as a back up to the Deputy Director Disability. The ERS is currently working with DER to add a Lead Disability Specialist positon to the position ordinance.

Thank you for your consideration of this request. Please let me know if you have any questions or concerns. We appreciate you taking the time to consider our proposed changes.

Sincerely,

Bernard J. Allen

Executive Director

Allen

CC: Charles Hughes

Melody Johnson

Enclosures: Notice of Temporary Appointment

Temporary Appointee statement of Understanding

Updated Job Description

Resume





Department of Employee Relations 200 E. Wells Street, Room 706 Milwaukee, WI 53202-3554



NOTICE OF TEMPORARY APPOINTMENT

Rule IX, Section 2 of the Civil Service Rules allows a department to appoint a person to a position on a temporary basis. A temporary appointment may be appropriate when services are for a limited period, or during the leave of absence of an employee who plans to return to the service of the city. Therefore a temporary appointment is limited to a period of 90 days, unless an extension is authorized by the City Service Commission.

When making an employment offer for a temporary appointment, the appointing officer must submit this completed form to DER no later than the close of the pay period in which the temporary appointment has been made. All temporary appointees must meet the minimum requirements established for the position to which the individual is appointed.

SEND COMPLETED FORM AND SUPPORTING DOCUMENTATION TO DER, CITY HALL, ROOM 706 OR DERCERTIFICATION@MILWAUKEE.GOV

	NTEE DETAILS					
DEPARTMENT/DIVISION	LAST NAME			FIRST NAME		INITIAL
AUTHORIZED POSITION TITLE	PAY RANG	GE	F&P COMMIT	TEE APPROVAL DATE	REQUISITION #	
INDERFILL TITLE (IF APPLICABLE)	PAY RANG	WAS THE INDIVIDUAL HIRED FROM AN ELIGIBLE LIST? Yes No If yes, Referral #				
•	MENT employee who is expected to return rary nature and for a limited period	6.26.202	_	PATED EXPIRATION DATE 6.2023	T.A. RATE OF P	AY
ATTACH A COPY OF THE CURRENT JOR	B DESCRIPTION & A RESUME IN ADDITI	ION TO COMPLE	TING THE INFO	ORMATION BELOW		
HE INDIVIDUAL WAS IDENTIFIED AS	SELECTED FOR THE APPOINTMENT, INC A POTENTIAL TEMPORARY APPOINTEE TRATE HOW THE INDIVIDUAL MEETS T	E:			M AN ELIGIBLE LIST	r, HOW
RAINING AND EDUCATION:						
	WORK EXPERIENCE:			OTHER REQUIRE	MENTS (i.e. LICENS	SES)
IS THIS INDIVIDUAL A CURRENT	IF YES, CURRENT DEPARTMENT:	CURRENT	POSITION TIT		MENTS (i.e. LICENS	·
IS THIS INDIVIDUAL A CURRENT CITY OF MILWAUKEE EMPLOYEE? Yes No IS THE INDIVIDUAL BEING GIVEN THI	IF YES, CURRENT DEPARTMENT: S TEMPORARY APPOINTMENT RELATE CT SUPERVISOR, OR TO ANY ELECTIVE	D BY BLOOD OR	POSITION TIT	LE: D THE APPOINTING OFFIC	EMPLOYEE ID NU	JMBER:
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Department of Employee Relations 200 E. Wells Street, Room 706 Milwaukee, WI 53202-3554



TEMPORARY APPOINTEE STATEMENT OF UNDERSTANDING

Rule IX, Section 2 of the Civil Service Rules allows a hiring authority to appoint a person to a position on a temporary basis. A temporary appointment may be appropriate when services are for a limited period, or during the leave of absence of an employee who plans to return to the service of the city. Therefore a temporary appointment is limited to a period of 90 days, unless an extension is authorized by the City Service Commission.

SECTION I. TO BE COMPLETED BY HIRING AUTHORITY - PLEASE TYPE OR PRINT LEGIBLY

APPLICANT NAME (last, first, middle)		DATE	
Bailey, Katrina		5/25/2022	
POSITION TITLE	PAY RANGE	RATE OF PAY	
Disability Specialist - Sr.	2EX	\$1,966.64	

SECTION II. TEMPORARY APPOINTEE STATEMENT OF UNDERSTANDING

I understand that if I am appointed to the position described above on a temporary basis, that I must meet the requirements for the position. I further understand that this temporary appointment may expire at any time and is limited to a period of 90 days, unless an extension at the request of the hiring authority is approved by the City of Milwaukee Civil Service Commission.

I understand that as a temporary appointee I am ineligible for paid holidays, sick leave, vacation or other benefits while serving on this temporary appointment, and that this temporary appointment shall not confer upon me any privilege of regular appointment. (Note: A current City of Milwaukee employee who accepts a temporary appointment to a different position retains his/her current benefits and civil service status).

I understand that if I wish to be considered for regular employment I must compete in a Civil Service examination for the position, and must pass the examination with a grade which shall place me among the top five scores on the eligible list in order to be eligible to interview for regular appointment to the position.

I understand that acceptance of a temporary appointment will not affect my rights to certification for permanent appointment to any position for which I am currently on an eligible list for.

In accordance with Civil Service Rule VIII, Section 10, concerning nepotism, I hereby certify that I am not related, either by blood or through marriage, to the appointing officer or to any member of the appointive board or body or to any direct superior or to any elective or appointive City official. (This includes relative of both whole and half blood, and extends to persons as closely related as first cousins when the relationship is by blood, or more closely related than first cousins when the relationship is through marriage, and includes the cases of husbands of sisters-in-law and wives of brothers-in-law).

A Rule IX, Section 2, temporary appointee who is on an eligible list may be considered for future regular appointment when the appointee ranks among the certifiable highest eligible on the list, or compete in a future examination.

Temporary Appointment Applicant Signature

Date Sianed

Witness Sidnatura

Witness Name (Print)

Katrina Bailey

Knowledgeable and detail-oriented **Human Resources Professional** with an exceptional record of streamlining processes and procedures that create a pleasant working environment for employees, increase company profit and reduce corporate liability.

- Analytical, articulate communicator possessing superior human relations, presentation and negotiation skills that ensure consistency, accuracy of information and successful outcomes.
- Well-organized with proven ability to effectively prioritize responsibilities, completing multiple, concurrent projects in a timely and professional manner.
- Proficient in Outlook, Word, Excel and PowerPoint.
- Detailed work style with strong analytical and critical thinking skills.
- Proficient with PeopleSoft HRMS/FMIS software.
- Excellent Public speaking skills/group facilitation and orientation.

EDUCATION

Bachelor of Arts in Business AdministrationJackson State University

PROFESSIONAL EXPERIENCE

<u> City of Milwaukee – Milwaukee, Wisconsin</u>

December 1996 - Present

Human Resources Analyst- Senior

November 2017 - Present

Promoted to a position of additional responsibility with this large municipality due to exceptional performance in previous role. Manage administration of all Milwaukee Police Department and Milwaukee Fire Department selection processes, including non-sworn civilian positions, entry level law enforcement and promotional examinations. Serve as a liaison between the departments' personnel and outside contractors/vendors employment by the Fire and Police Commission.

- Plan and prepare for public safety department positions; including the coordination of medical examinations, drug screen test, background investigations, psychological examinations, and administrative appeals of examination results.
- Maintain contact with future hires throughout the selection process; and meets with or counsels candidates to discuss complaints or examination results.
- Provide training; guidance and assistance to those who conduct employment interviews, background investigations, medical/psychological examinations, and assessment exercises.
- Supervise all testing events; including Physical Readiness Test, written examinations, oral board examinations, and writing sample examination.

Human Resources Analyst Senior - Milwaukee Police Department—HR Division March 2013 — November 2017 Develop and execute recruitment plans and strategies for the proper classification with the Milwaukee Police Department. Review and prepare job announcement bulletins. Determine appropriate job analysis methods; conduct job analysis to determine critical task and the knowledge, skills, abilities, and other characteristics necessary for successful job performance. Participate and execute the Career Ladder component for salary compensation of the Emergency Communication Division; Police Telecommunicator, Police Dispatcher, and Police Record Specialists. Provide on-boarding and orientation presentation of law enforcement and civilian employees. Prepare and present vacancy request in front of the Finance and Personnel Board. Presented correspondences along with supporting documentation to the Fire and Police Commission board meetings.

Plan and develop or recommend use of valid and reliable test components, including promotional and
performance examinations and education and experience ratings (including minimum requirements), and other
assessment exercises based on job analysis and consistent with profession standards and legal guidelines.

- Coordinated with the City Attorney's Office and the Department of Workforce Development to arrange for medical and vocational evaluations, calculate financial exposure, assess risk, negotiate settlements and file required forms within set time limits. Acted as a representative of the City of Milwaukee for all files litigated through settlement, which included attending pre-hearing meetings with the State of Wisconsin.
- Developed new policies for gathering pertinent information from claimants including a checklist of all documents necessary and a chronological dating system for file information.
- Remained educated on current State of Wisconsin Worker's Compensation
- Act updates; reviewed files in accordance with changes.

City of Milwaukee CS-25, Rev. 11/14

JOB DESCRIPTION

FOR DER USE ONLY				
Vacancy No.				
City Service	Finance			
Commission:	Committee:			
Fire & Police	Common			
Commission:	Council:			

<u>Instructions</u>: Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

1. Date Prepared/ Revised: 2. Present Incumbent 66/07/2020 Katrina		t: la Bailey		nt underfillinç	position?			
3. Date Filled: 4. Previous Incumber		nt:		O ⊠ ate Underfill Title	in box 10.			
5. C	Department:		Bureau	u:	Unit:			
			Divisio	on: Administration	Section:			
6. V	Vork Location: 789 N Wat	er St, Ste 300	Teleph	none: 286-3557	Work Sche	dule:		
Milwaukee, WI 53202 Ema		Email:		Hours: 8am – 4:45pm / Days: M-F				
7. Represented by a 8. Bargaining Unit: N		Non-Mgmt/Non-Rep	9. F	LSA Status (d	check one):			
Union? ☐ Yes ☒ No If in District Council 4		ouncil 4	l8, which local?		Exempt 🔲 N	lon-Exempt		
10.	Official Title:				Pay Range	Job Code	EEO Code	
Disability Specialist - Senior					2EX			
Underfill Title (if applicable):								
Requested Title (if								
applicable):								
Recommended Title (DER Use Only):		Approved by:						
				Date:				

11. BASIC FUNCTION OF POSITION:

Responsible for the administration of the disability program, including applications and re-examinations for ordinary and duty disability, scheduling of medical exams, administers conversions, deemed conversions of disability retirees, and review and submission of application materials and associated records. Duties include on-going correspondence and communication with members (active and retired), physicians and staff, legal staff, ERS Board, internal ERS staff, Worker's Compensation Dept., and other affected personnel. Understands and applies associated rules, regulations, and legal opinions governing the process. Performs complex clerical, secretarial and administrative work for the Deputy Director of ERS and the Chief Investment Officer. In addition position serves as backup for the Administrative Assistant IV.

12. DESCRIPTION OF JOB (Check if description applies to **Official Title** ⋈ or **Underfill Title** □):

A. ESSENTIAL FUNCTIONS/Duties and Responsibilities: (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
50%	 Administers the disability program through fielding inquiries from members, completion of application materials, scheduling of medical reviews and appointments, collection of medical records, payment of records and medical fees. General processing the application through various steps in the process, including verification of accuracy of information and application of appropriate guidelines.
10%	Maintains appropriate records and prepares reports for the Medical Council, Medical Panel, and the ERS Board.
10%	Counsels members regarding benefit eligibility, coverages, and other terms and conditions of the disability program.
10%	 Coordinates efforts with the other Disability Specialist – Senior for adequate staffing and coverage of duties, meets and reports to the Disability Deputy Director to assure efficient processing of duties and the redress of special circumstances.
5%	 Performs all duties and functions as secretary for Deputy Director of ERS and Chief Investment Officer and their staff, including answering phones, receiving guests, filing, typing correspondence and coordinating meetings and calendars.

% of Time	ESSENTIAL FUNCTION
5%	Composes, types, and edits a variety of correspondence, reports, memoranda, and other material requiring judgement as to content, accuracy, and completeness at the direction of the Deputy Director and Chief Investment Officer.
5%	Assists the Administrative Assistant IV in preparing Board Agendas, assembling Board and information packets for Board Members, keeping Board meeting records, etc.
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	•

B. PERIPHERAL DUTIES:

% of Time	PERIPHERAL DUTY
5%	Other Duties as assigned including backup to Administrative Assistant IV for meetings of Annuity and Pension Board and/or subcommittees.
	•
	•
	•

C. NAME AND TITLE OF **IMMEDIATE** SUPERVISOR:

Gust P. Petropoulos, Deputy Director, Disability

D. SUPERVISION RECEIVED: (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

Position receives priority and policy direction from the Disability Deputy Director.

E. SUPERVISION EXERCISED:

Total number of employees for whom responsible, either directly or indirectly = N/A.

<u>Direct Supervision:</u> List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

a. Assign d	uties	e.	. Sign or approve work
b. Outline r	nethods	f.	Make hiring recommendations
 c. Direct wo 	ork in progress	g.	. Prepare performance appraisals
d. Check or	r inspect completed work	h.	. Take disciplinary action or effectively recommend such
Number			Extent of Supervision Exercised
Supervised	Job Title		(Select those that apply from list above, a - h)
-			
_			

F. MINIMIMUM QUALIFICATIONS REQUIRED: (Indicate the MINIMUM qualifications required to <u>enter</u> the job.)

- i. Education and Experience:
 - 1. Bachelor's Degree in Human Resources, Human Services, Public Administration, Business, or associated field of study.
 - 2. Four years of experience in an office setting managing employee benefits, interface with employees, maintaining appropriate records and their distribution, background and experience in disability or similar benefit processing, and public pension plan experience.

- ii. 3. Equivalent combinations of education and experience may also be considered.
- iii. Knowledge, Skills and Abilities:
 - 1. Analytical and critical thinking abilities that enable one to process information, apply said information to an administrative process, and understand the implications of said information to the process.
 - 2. Effective verbal and written communication skills. Ability to prepare executive summaries for senior management, the City Attorney's Office, city staff, sub-committees, and the ERS Board.
 - 3. Ability to maintain confidentiality throughout the duties of Disability Specialist Senior
 - 4. Strong reading comprehension abilities.
 - 5. Ability to understand, retain, and put in practice concepts that transit the medical and legal professions, ideally having some experience in the medical and/or legal fields.

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- v. <u>Certifications, Licenses, Registrations:</u>
- vi. Other Requirements:
 - 1. Honesty, integrity, and empathy.
 - 2. Self-directed and well organized.
 - 3. Patience and restraint.

13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

G. PHYSICAL ACTIVITY OF THE POSITION: (List the physical activities that are representative of those that must be met to successfully perform the essential functions of the job).

CHECK ALL THAT APPLY:

	Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and
	legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing
	required exceeds that required for ordinary locomotion.
	Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow,
	slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that
	needed for ordinary locomotion and maintenance of body equilibrium.
	Stooping: Bending body downward and forward by bending spine at the waist. Check only if it occurs to a
	considerable degree and requires full use of the lower extremities and back muscles.
	Kneeling: Bending legs at knee to come to a rest on knee or knees.
	Crouching: Bending the body downward and forward by bending leg and spine.
	Crawling: Moving about on hands and knees or hands and feet.
	Reaching: Extending Hand(s) and arm(s) in any direction.
	Standing: Particularly for sustained periods of time.
	Walking: Moving about on foot to accomplish tasks, particularly for long distances.
	Pushing: Using upper extremities to exert force in order to draw, press against something with steady
	force in order to thrust forward, downward or outward.
	Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained
	motion.
	Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-
	position. Check only if it occurs to a considerable degree and requires substantial use of the upper
	extremities and back muscles.
\boxtimes	Fingering: Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole
	hand or arm, as in handling.
	Grasping: Applying pressure to an object with fingers and palm.
	Feeling: Perceiving attributes of objects such as size, shape, temperature or texture by touching with the
	skin, particularly that of the fingertips.

	\boxtimes	Talking: Expressing or exchanging ideas by means of the spoken word. Those activities which demand
	\boxtimes	detailed or important instructions spoken to other workers accurately, loudly or quickly. Hearing: Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral
		communication and make fine discriminations in sound.
	\boxtimes	Repetitive Motions: Substantial movements (motions) of the wrist, hands, and/or fingers.
		Driving: Minimum standards required by State Law (including license).
Н.	PH	YSICAL REQUIREMENTS OF THE POSITION: (List the physical requirements that are essential
		ctions of the job.)
	СН	ECK ONE:
	\boxtimes	Sedentary Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force
		frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
		Light Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated for Light Work.
		Medium Work: Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
		Heavy Work: Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
		Very Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.
I.	job.	GUAL ACUITY REQUIREMENTS: (List the visual acuity requirements that are essential functions of the
	JOD.	.)
		ECK ONE:
	\boxtimes	Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative: This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing
		and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
		Machine Operators, Mechanics, Skilled Tradespeople: This is a minimum standard for use with those whose work deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and
		skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service
		people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.) Mobile Equipment Operators: This is a minimum standard for use with those who operate cars, trucks, forklifts,
	Ш	cranes, and high lift equipment.
		Other: This is a minimum standard based on the criteria of accuracy and neatness of work for janitors, sweepers,
		etc.
J.	ТН	E CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:
-		the environmental/working conditions to which the employee may be exposed while performing the
		ential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating
	shif	ft, etc. Approximate Percentage of time performing field work:%
	СН	ECK ALL THAT APPLY:
		None: The worker is not substantially exposed to adverse environmental conditions (such as typical office or
	\boxtimes	administrative work).
		The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes (i.e. warehouses, covered loading docks, garages, etc.)
		The worker is subject to outside environmental conditions: No effective protection from weather.
		The worker is subject to extreme cold: Temperatures below 32 degrees for period of more than one hour.
		The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour.
		The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
		The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
		The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals.
		The worker is subject to atmospheric conditions: One or more of the following conditions that affect the
		respiratory system or the skin: Fumes, odors, dust, mists, gases or poor ventilation. The worker is subject to oil: There is air and/or skin exposure to oils and other cutting fluids.

The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.

I.

K.	MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION: List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)
	CHECK ALL THAT APPLY:
	Camera and photographic equipment ☐ Cleaning supplies ☐ Commercial vehicle ☐ Data processing equipment ☐ Handcart ☐ Cleaning supplies ☐ Office Equipment (desk, chair, telephone, etc.) ☐ Office supplies (pens, staplers, pencils, etc.) ☐ Packing materials (boxes, shrink wrap, etc.) ☐ PC equipment (monitor, keyboard, printer, etc.) ☐ PC software
	☐ Hand tools (please list):
	Office Machines <i>(check all that apply):</i> Oopier Facsimile Calculator Cash register
	Other (please list):
L.	SUPPLEMENTARY INFORMATION: (Indicate any other information which further explains the importance, difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such a personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)
М.	I believe that the statements made above in describing this job are complete and accurate.