



**SUPERIOR COURT OF CALIFORNIA
COUNTY OF MERCED**

**JOB ANNOUNCEMENT
#18-6**

**Probate Examiner (Part-Time; 2 – 3 days/wk.)
Open Recruitment**

Filing Deadline: July 10, 2018

Hourly Rate: \$23.15 - \$28.16

4:30pm Actual Receipt

DEFINITION:

Under general supervision, a Probate Examiner provides technical expertise in the procedural aspects of probate cases; and performs related duties as required.

DISTINGUISHING CHARACTERISTICS:

This is a single level professional class responsible for reviewing a variety of probate matters prior to submission to the judge. This class is distinguished from Court Investigator in the latter performs probate investigation rather than file review and evaluation.

ESSENTIAL FUNCTIONS

The following duties are normal for this position. The omission of specific statements of the duties does not exclude them from the classification if the work is similar, related or a logical assignment for this classification. Other duties may be required and assigned.

1. Performs technical reviews of probate files; reviews detailed financial and accounting records; reviews applications and provides recommendations for revisions; performs related computer data entry; posts probate notes on court's website; creates lists of defects in probate matters; refers certain matters to the research attorney
2. Attends court hearings; monitors cases during court sessions; reviews related documents; provides recommendations; prepares notes of action taken in court; monitors probate matters for future action and compliance with code and rule requirements; interacts with attorneys; provides direction to rectify technical defects.
3. Conducts legal research; posts pertinent information and law changes on the court's website; creates local court forms; reviews and drafts local rules; reviews changes in law and procedures; consults practice guides and legal publications; conducts on-line research; reviews probate codes and rules of the court.
4. Creates, maintains, and updates probate procedures policy manual.
5. Prepares, maintains and distributes statistical reports and related budgets for approval.
6. May be required to conduct monthly mandatory sessions for new conservators and guardians including providing instructions for simple accounting.
7. Performs routine office related tasks; answers incoming calls; maintains filing systems; orders supplies.
8. Reviews inventories of assets for accuracy, completeness, and compliance with probate code.

9. Assists in the preparation, maintenance, and distribution of the list of attorneys eligible for court appointment in probate matters as directed.
10. Complete education and attend trainings as required by the Court and the Rules of Court.
11. Maintain confidential information in accordance with legal standards and/or other regulations including labor and employment bargaining information.
12. Performs other related duties as required.

Supervisory Duties:

None

MINIMUM QUALIFICATIONS

Necessary Employment Standards

As applicable to assigned areas of responsibility

Knowledge of:

- Basic legal terminology and legal procedures
- Functions and purpose of probate laws
- Basic accounting and bookkeeping methods and practices
- Provisions of the Probate Code, Civil Code, Code of Civil Procedures, Revenue and Taxation Codes, rules promulgated by the Judicial Council, and Superior Court rules which are regularly applied in the examination of the petitions for conservatorships, probate of wills and other actions requiring approval of the Probate Court
- Legal procedures and documents pertaining to probate matters.

Skill/Ability to:

- Perform basic accounting, bookkeeping and mathematical computations
- Read and comprehend complex provisions of probate law
- Analyze complex information and data, correctly identify problems and develop valid courses of action to resolve problems
- Communicate effectively, both orally and in writing, with individuals from various backgrounds and education levels
- Deal courteously and tactfully with the public, attorneys, court officials and other staff
- Use a computer to word process and communicate
- Examine and determine if the contents of probate files are consistent with statutory procedural requirements
- Apply pertinent provisions of the Probate Code, Civil Code, Code of Civil Procedure, rules promulgated by the Judicial Council, and Superior Court rules to individual circumstances and case facts
- Explain defects in filings
- Assist pro per clients in filing guardianship cases
- Communicate effectively to members of the public regarding various topics related to probate matters

EDUCATION AND EXPERIENCE REQUIRED

Education:

Graduation from an accredited college or university with a Bachelor's degree; AND two (2) years of full-time, increasingly responsible experience processing and documenting cases related to probate, civil, family, juvenile, and/or LPS mental health matters from one or more of the following employers:

a court; a public or private law office; and/or a public administrator, public guardian, public conservator, or private professional fiduciary; OR

Graduation from an accredited college or university with a paralegal certificate or an Associate's degree; AND four (4) years of full-time, increasingly responsible experience processing and documenting cases related to probate, civil, family, juvenile, and/or LPS mental health matters from one or more the following employers: a court, a public or private law office; and/or a public administrator, public guardian, public conservator, or private professional fiduciary; OR

Graduation from an accredited college or university with a Juris Doctorate (J.D.) degree; AND six (6) months of full-time increasingly responsible experience processing and documenting cases related to probate, civil, family, juvenile, and/or LPS mental health matters from one or more of the following employers: a court, a public or private law office; and/or public administrator, public guardian, public conservator, or private professional fiduciary.

Substitution:

A paralegal certificate from an accredited university is highly desirable and may substitute for one (1) year of the clerical experience.

License, Certification and/or Special Requirements:

- A valid class C California driver's license may be required. The requirement will be reviewed on a position basis in accordance with ADA regulations.

ESSENTIAL PHYSICAL AND MENTAL DEMANDS

Performance Aptitudes

Data Utilization: Requires the ability to review, classify, categorize, prioritize, and/or analyze data. Includes exercising discretion in determining data classification, and in referencing such analysis to established standards for the purpose of recognizing actual or probable interactive effects and relationships.

Human Interaction: Requires the ability to apply principles of persuasion and/or influence over others in coordinating activities of a project, program, or designated area of responsibility.

Equipment, Machinery, Tools, and Materials Utilization: Requires the ability to operate, maneuver, and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential functions.

Verbal Aptitude: Requires the ability to utilize a wide variety of reference, descriptive, and/or advisory data, and information.

Mathematical Aptitude: Requires the ability to perform addition, subtraction, multiplication, and division; the ability to calculate decimals and percentages; the ability to utilize principles of fractions; and the ability to interpret graphs.

Functional Reasoning: Requires the ability to apply principles of influence systems, such as motivation, incentive, and leadership, and to exercise independent judgment to apply facts and principles for developing approaches and techniques to resolve problems.

Situational Reasoning: Requires the ability to exercise judgment, decisiveness, and creativity in situations involving the evaluation of information against sensory, judgmental, or subjective criteria, as opposed to that which is clearly measurable or verifiable.

Physical Ability:

- Strength, dexterity, coordination, and vision to use a keyboard, computer monitor, and other office equipment on a daily basis and for extended periods of time
- Fine finger manipulations, dexterity, and coordination to handle files and single pieces of paper
- Forceful and repetitive gripping, grasping, and pinching

- Occasional lifting and carrying of objects weighing up to 20 lbs.
- Frequent reaching for items on shelves, above, at, and below desk/shoulder level
- Exert up to 20 lbs. of force occasionally, and/or up to 10 lbs. of force frequently, and/or negligible amount of force constantly to move, torque, twist, push, and pull objects
- Frequently sit for extended periods; frequently stand for extended periods; and frequently walk, move, bend, stoop, lift, and stretch
- Able to move to different locations such as, but not limited to: courtrooms, clerk's office, various departments, other court facilities, and desk assignments based on the operational needs of the Court
- Able to traverse inside and outside over uneven ground and pavement
- Perform repetitive writing, typing, copying
- Employees are regularly required to verbally communicate both in person and by telephone
- Corrected hearing and vision to normal range

Sensory Requirements: Some tasks require the ability to perceive and discriminate colors or shades of colors, sounds, and visual cues or signals. Some tasks require the ability to communicate orally.

Environmental Factors: Essential functions are regularly performed without exposure to adverse environmental conditions.

APPLICATION AND SELECTION PROCESS

Applications may be obtained from and submitted to:

Merced Superior Court
Human Resources
627 W. 21st St., Room 20
Merced, CA 95340
(209) 725-4103

Or visit our website at www.mercedcourt.org

All applications for employment must be made on an official application form and must be filed with Human Resources on or prior to the closing date and time for receipt of applications. Postmarked and faxed applications will not be accepted. A resume may be included with the application as supplemental information, but will not be accepted in lieu of an official application. All information on the application must be completed – “see resume or see attached” is not acceptable. Applications must be legible, signed and complete (including copies of licenses, certificates, transcripts, Supplemental Questionnaire, etc. if required). All information is subject to investigation and verification.

The selection process is subject to change. Applications will be accepted on a continuous basis until a sufficient number are received at which time the recruitment will be closed or the filing deadline has occurred. In order to insure proper evaluation of employment qualifications, it is suggested that applicants read the directions carefully and fill out the application **COMPLETELY**. Those applicants meeting the minimum qualifications and possessing the most relevant experience as shown on the application may be invited for an interview. The screening of applications will be done by Human Resources who will determine the most qualified to be referred for interviews.

If you require accommodations in the application or interview process, contact Human Resources at the number listed above before the deadline posted on the job announcement.

Merced Superior Court is an Equal Opportunity Employer.

Posted 06/25/18



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GENERAL INFORMATION

Conditions of Employment

Successful completion of fingerprinting and a criminal record background check is required prior to appointment and is a condition of employment.

All employees of the court who operate a vehicle on court business must certify they possess a valid California Driver's License and required levels of automobile insurance. A Department of Motor Vehicles search will be done and employee must have an acceptable driving record in order to operate a vehicle on court business.

Convictions

Felony and misdemeanor convictions MAY BE disqualifying for employment with the court.

Drug Free Workplace Policy

The use of illicit drugs and alcohol is not permitted in the workplace. Employees who violate this policy are subject to disciplinary procedures which include termination.

Employment Eligibility

In accordance with the Immigration Reform and Control Act of 1986, all persons hired after November 6, 1986, are required to present to the Court, at the time of appointment, original documents which show satisfactory proof of: 1) identity and 2) U.S. Citizenship or a legal right to work permanently in the United States.

Introductory Period

Individuals accepting regular appointments must successfully complete an introductory period.

Union Representative

Merced County Trial Court Employees (MCTCE), Local 1, is the negotiating agent for some Merced Court job classifications. Management, Supervisory and Confidential positions are not represented.

Benefits Include (for Regular Status employees only, prorated for variable shift part time employees):

Vacation:

10 days paid vacation each year for the first 5 years of employment
15 days accrual during the second 5 years
20 days accrual after 10 years
25 days accrual after 20 years

Health Insurance:

Major group medical, dental and vision currently paid for by the Court for the employee and medical, dental and vision care for eligible dependents with 50% of the premium paid by the Court.

Sick Leave:

Unlimited sick leave accumulation

Life Insurance:

Represented employees - \$10,000 with premium paid by Court.

Holidays:

14 paid holidays

Management employees - \$5,000 with premium paid by Court PLUS additional life insurance provided by Court (\$30,000 to \$80,000 depending on position).

(Accrual is based on work hours. 5 years = 10,400 regular scheduled work hours; 10 years = 20,800 regular scheduled work hours; 20 years = 41,600; 25 years = 52,000 regular scheduled work hours.)

Employee Assistance Program:

6 free visits per incident per year. Available to qualifying dependents.

Retirement:

Court employees are covered by the Merced County Employees' Retirement Association (MCERA), a Defined Benefit Retirement System governed by the County Employees' Retirement Act of 1937.

Recruitment Reviews

Applicants who are not court employees and contend that the Court has misapplied, misinterpreted, or violated the recruitment policies may file a written notice with Human Resources for reconsideration of his or her qualifications within ten (10) days of the date the non-qualification notice was mailed, and a reply will be mailed to the applicant. Human Resources' decision shall be final.

If an employee contends that the Court has misapplied, misinterpreted, or violated the recruitment policies, notification must be filed with the Court Executive Officer, whose decision will be final. Any such request must be filed within ten (10) days of the date on which notification of non-qualification was received by the employee. If notice is provided by mail, the notice shall be deemed to have been received five days after the date of mailing. In accordance with the Memorandum of Understanding, recruitment and selection issues are excluded from the grievance procedure.

The above information is a general summary of benefits for this position. This information is not legally binding, nor does it serve as a contract.