



**MULTNOMAH COUNTY
AGENDA PLACEMENT REQUEST
BUDGET MODIFICATION**

(Revised: 5/24/13)

APPROVED: MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C.3 DATE 7/18/13
LYNDA GROW, BOARD CLERK

Board Clerk Use Only

Meeting Date: 7/18/13
Agenda Item #: C.3
Est. Start Time: 9:30 am
Date Submitted: 7/2/13

Agenda Title: BUDGET MODIFICATION # HD-14-01 authorizing four position re-classifications within various divisions of the Health Department.

Note: if Contingency, use that form. If item other than a BudMod, please use different APR. : Title should not be more than 2 lines but sufficient to describe the action requested.

Requested Meeting Date: August 1, 2013 **Time Needed:** N/A - Consent
Integrated Clinical Services & Community Health Services

Department: Health Department **Division:** Health Services

Contact(s): Lester A. Walker - Budget & Finance Manager

Phone: (503) 988-3663 **Ext.** 26457 **I/O Address:** 167/2/210

Presenter Name(s) & Title(s): N/A (Consent Agenda)

General Information

1. What action are you requesting from the Board?

Approval of staffing adjustments resulting from the reclassification of four positions. This change will not impact the Health Department's total FTE for FY2014. The positions were not part of the amendment process because they had not been approved by the Class Comp unit.

2. Please provide sufficient background information for the Board and the public to understand this issue. Please note which Program Offer this action affects and how it impacts the results.

Reclassify a 1.00 FTE Program Supervisor to a 1.00 FTE Manager 2, position 709930, in the Community Health Services Division of the Health Department. Class Comp approved the reclassification effective 11/16/2012 (reclassification #2210). The duties and responsibilities of this position have gradually changed. This position is currently responsible for providing leadership and strategic direction for the Healthy Birth Initiative (HBI), Welcome Baby, and Action Communities for Health, Innovation and Environmental Change (ACHIEVE) programs, which are focused on creating an equitable system of

health promotion, prevention, and care that empowers people, improves the quality of life, and reduces rates of negative birth outcomes for African American families. This position is responsible for developing, implementing, and evaluating program policies, procedures, practices; establishing a framework for assessing the effectiveness and quality of services and public health approaches; developing innovative strategies to promote population-wide health; developing and enhancing community-wide approaches to assessment and screening; and developing and maintaining relationships with external public and private agencies.

This change impacts program offer 40013B—Early Childhood Services.

Reclassify a 1.00 FTE Data Analyst to a 1.00 FTE Operations Process Specialist, position 712360, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 6/03/2013 (reclassification #2222). This position is being reclassified because the current classification does not accurately reflect the work being performed. This position will be responsible for serving as an expert in the use of clinical systems to improve and support clinical and operational workflows. This position will work with end-users and leadership to identify, analyze, and clarify areas for improvement in systems, hardware, and workflows; complete application configuration, maintain use security; monitor and resolve electronic errors; and coordinate and consult with staff, IT, and vendors.

This change impacts program offer 40032—Lab and Medical Records.

Reclassify a 1.00 FTE Program Specialist Senior to a 1.00 FTE Project Manager, position 713829, in the Community Health Services Division of the Health Department. Class Comp approved the reclassification effective 12/14/2012 (reclassification #2238). The duties and responsibilities of this position have gradually change overtime. This position is responsible for developing, implementing, communicating, managing, and tracking informatics/technology projects; communicating master schedule that outlines goals, timelines, identified resources, and key milestones/results; and researching established policies, procedures, regulations, project management methodology, and modifying project plans as needed. In addition, this position is responsible for programmatic systems analysis and CHS-wide systems analysis for purposes of making recommendations to support the optimization of electronic data and data systems utilization.

This change impacts program offer 40013A & 40013B—Early Childhood Services.

Reclassify a 1.00 FTE Office Assistant Senior to a 1.00 FTE Finance Technician, position 714530, in the Community Health Services Division of the Health Department. Class Comp approved the reclassification effective 10/26/2012 (reclassification #2190). This position is being reclassified because the current classification does not accurately reflect the work. This position is responsible for resolving ECS billing issues, which include determining appropriate medical billing codes for services rendered or high/at-risk pregnant and postpartum women, infants, and children with specials needs; clarifying billing information submitted with providers; identifying billing errors; performing data entry to correct inaccurate information in EPIC; logging Encounter Accuracy Reports submitted by Community Health Nurses. Additionally, the position performs some administrative support duties: timesheet processing and entry; purchasing of supplies, equipment, and special order items; taking minutes at various meetings; and training new staff members as needed.

This change impacts program offer 40013A & 40013B—Early Childhood Services.

3. Explain the fiscal impact (current year and ongoing)

This budget modification has no fiscal impact in the current year. Budgeted personnel costs are within the pay scales of new classifications or other budgeted line items have been adjusted so that the changes are budget neutral.

The reclassification of position 709930 to a Manager 2 increased budgeted personnel cost by \$12,328 because the step at which the Manager 2 is budgeted is higher than the step at which the Program Supervisor is budgeted. The increase in cost is offset by a decrease in professional services for no net fiscal impact this fiscal year.

In subsequent fiscal years, the reclassified positions will be subject to approved cost of living adjustments (COLA) and step and merit pay increases in accordance with collective bargaining agreements and county personnel rules. Increased costs will be funded within the department's budget.

4. Explain any legal and/or policy issues involved.

N/A

5. Explain any citizen and/or other government participation that has or will take place.

N/A

Budget Modification

If the request is a **Budget Modification**, please answer **all** of the following in detail:

- **What revenue is being changed and why? If the revenue is from a federal source, please list the Catalog of Federal Assistance Number (CFDA).**

No change in revenues.

- **What budgets are increased/decreased?**

The Health Department's budget will have the following changes:

- Permanent personnel budget will increase by \$8,659
- Salary related expense budget will increase by \$3,019
- Insurance benefits budget will increase by \$650
- Professional Services budget will decrease by \$1,233
- Travel & Training budget will decrease by \$11,095

These changes will have no financial impact on the budget and do not change the Health Department's total FTE.

- **What do the changes accomplish?**

Changes of classification for positions 709930, 712360, 713829, and 714530 better fit the duties of this position as determined by the Class/Comp Unit of the Central Human Resources.

- **Do any personnel actions result from this budget modification? Explain.**

- Reclassify a 1.00 FTE Program Supervisor to a 1.00 FTE Manager 2, position 709930, in the Community Health Services Division of the Health Department. Class Comp approved #2210.
- Reclassify a 1.00 FTE Data Analyst to a 1.00 FTE Operations Process Specialist,

position 712360, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #2222.

- Reclassify a 1.00 FTE Program Specialist Senior to a 1.00 FTE Project Manager, position 713829, in the Community Health Services Division of the Health Department. Class Comp approved #2238.
- Reclassify a 1.00 FTE Office Assistant Senior to a 1.00 FTE Finance Technician, position 714530, in the Community Health Services Division of the Health Department. Class Comp approved #2190.
- **If a grant, is 100% of the central and department indirect recovered? If not, please explain why.**
N/A
- **Is the revenue one-time-only in nature? Will the function be ongoing? What plans are in place to identify a sufficient ongoing funding stream?**
N/A
- **If a grant, what period does the grant cover? When the grant expires, what are funding plans? Are there any particular stipulations required by the grant (i.e. cash match, in kind match, reporting requirements etc)?**
N/A

NOTE: Attach a Budget Modification Expense & Revenues Worksheet and/or a Budget Modification Personnel Worksheet.

Required Signatures

Elected Official or Dept Director: Lillian Shirley/s/kj **Date:** 6/28/13

Budget Analyst: Althea Gregory /s/ **Date:** 7/2/13

Department HR: Kathleen Fuller-Poe /s/ **Date:** 06/26/2013

Countywide HR: Karie Miller /s/ **Date:** 7/2/13

Note: Please submit electronically. Insert names of your approvers followed by /s/ - we no longer use actual signatures. Please date each signature. Use "n/a" when signature not applicable."

Budget Modification ID: **HD-14-01**

EXPENDITURES & REVENUES

Please show an increase in revenue as a negative value and a decrease as a positive value for consistency with SAP.

Budget/Fiscal Year: 2014

Line No.	Fund Center	Fund Code	Program #	Func. Area	Internal Order	Accounting Unit		Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal	Description
						Cost Center	WBS Element						
1	40-47	1000	40013B	0030			4FA23-12-GF	60000	7,565	8,431	866		Increase Permanent
2	40-47	1000	40013B	0030			4FA23-12-GF	60130	2,638	2,940	302		Increase Salary Related Expns
3	40-47	1000	40013B	0030			4FA23-12-GF	60140	1,982	2,047	65		Increase Insurance Benefits
4	40-47	1000	40013B	0030			4FA23-12-GF3	60170	22,794	21,561	(1,233)		Decrease Professional Svcs
5										0			
6	40-47	21640	40013B	0030			4FA23-12-1	60000	460,316	468,109	7,793		Increase Permanent
7	40-47	21640	40013B	0030			4FA23-12-1	60130	156,940	159,657	2,717		Increase Salary Related Expns
8	40-47	21640	40013B	0030			4FA23-12-1	60140	132,042	132,627	585		Increase Insurance Benefits
9	40-47	21640	40013B	0030			4FA23-12-1	60260	27,000	15,905	(11,095)		Decrease Travel & Training
10										0			
11	72-80	3500		0020		705210		50316	(63,557,774)	(63,558,424)	(650)		Insurance Revenue
12	72-80	3500		0020		705210		60330	2,124,430	2,125,080	650		Offsetting Expenditure
13										0			
14										0			
15										0			
16										0			
17										0			
18										0			
19										0			
20										0			
21										0			
22										0			
23										0			
24										0			
25										0			
26										0			
27										0			
28										0			
29										0			
											0	0	Total - Page 1
											0	0	GRAND TOTAL

ANNUALIZED PERSONNEL CHANGE

Change on a full year basis even though this action affects only a part of the fiscal year (FY).

							ANNUALIZED			
Fund	Job #	HR Org	CC/WBS/IO	Position Title	Position Number	FTE	BASE PAY	FRINGE	INSUR	TOTAL
1000	9361	61488	4FA23-12-GF	PROGRAM SUPERVISOR	709930	(0.10)	(7,565)	(2,638)	(1,982)	(12,185)
21640	9361	61488	4FA23-12-1	PROGRAM SUPERVISOR	709930	(0.90)	(68,084)	(23,741)	(17,843)	(109,668)
1000	9364	61488	4FA23-12-GF	MANAGER 2	709930	0.10	8,431	2,940	2,047	13,418
21640	9364	61488	4FA23-12-1	MANAGER 2	709930	0.90	75,877	26,458	18,428	120,763
1000	6073	64530	47020-GF	DATA ANALYST	712360	(1.00)	(62,765)	(20,807)	(18,859)	(102,431)
1000	6500	64530	47020-GF	OPERATIONS PROCESS SPECIALIST	712360	1.00	62,765	20,807	18,859	102,431
1000	6088	55325	44701-GF	PROGRAM SPECIALIST/SR	713829	(1.00)	(77,172)	(25,582)	(19,940)	(122,694)
1000	6063	65325	44701-GF	PROJECT MANAGER	713829	1.00	77,172	25,582	19,940	122,694
1000	6002	66578	44701-GF	OFFICE ASSISTANT/SR	714530	(1.00)	(43,994)	(15,340)	(17,452)	(76,786)
1000	6027	66578	44701-GF	FINANCE TECHNICIAN	714530	1.00	43,994	15,340	17,452	76,786
TOTAL ANNUALIZED CHANGES						0.00	8,659	3,019	650	12,328

CURRENT YEAR PERSONNEL DOLLAR CHANGE

Calculate costs/savings that will take place in this FY; these should explain the actual dollar amounts being changed by this Bud Mod.

							CURRENT YEAR			
Fund	Job #	HR Org	CC/WBS/IO	Position Title	Position Number	FTE	BASE PAY	FRINGE	INSUR	TOTAL
1000	9361	61488	4FA23-12-GF	PROGRAM SUPERVISOR	709930	(0.10)	(7,565)	(2,638)	(1,982)	(12,185)
21640	9361	61488	4FA23-12-1	PROGRAM SUPERVISOR	709930	(0.90)	(68,084)	(23,741)	(17,843)	(109,668)
1000	9364	61488	4FA23-12-GF	MANAGER 2	709930	0.10	8,431	2,940	2,047	13,418
21640	9364	61488	4FA23-12-1	MANAGER 2	709930	0.90	75,877	26,458	18,428	120,763
1000	6073	64530	47020-GF	DATA ANALYST	712350	(1.00)	(62,765)	(20,807)	(18,859)	(102,431)
1000	6500	64530	47020-GF	OPERATIONS PROCESS SPECIALIST	712360	1.00	62,765	20,807	18,859	102,431
1000	6088	65325	44701-GF	PROGRAM SPECIALIST/SR	713829	(1.00)	(77,172)	(25,582)	(19,940)	(122,694)
1000	6063	65325	44701-GF	PROJECT MANAGER	713829	1.00	77,172	25,582	19,940	122,694
1000	6002	66578	44701-GF	OFFICE ASSISTANT/SR	714530	(1.00)	(43,994)	(15,340)	(17,452)	(76,786)
1000	6027	66578	44701-GF	FINANCE TECHNICIAN	714530	1.00	43,994	15,340	17,452	76,786
TOTAL CURRENT FY CHANGES						0.00	8,659	3,019	650	12,328

FM Side			PS/CO Side			Cost Element/Commitment		Notes
FM Fund Center	FM Fund Code	Functional Area	Internal Order	Cost Center	WBS Element	Item		
General Fund Contingency								
19	1000	0020		9500001000		60470	Reduce available General Fund Contingency	
xx-xx	xxxxx	0020		xxx	xxx	xxxxx	Increase Expenditure	
Indirect								
Central								
xx-xx	xxxxx				xxx	60350	Indirect Expenditure	
19	1000	0020		9500001000		50310	Indirect reimbursement revenue in General Fund	
19	1000	0020		9500001000		60470	CGF Contingency expenditure	
Departmental								
xxx	xxxxx			xxx	xxx	60355	Indirect Department Expenditure	
xx-xx	1000			xxx	xxx	50370	Indirect Dept reimbursement revenue in General Fund	
xx-xx	1000			xxx	xxx	xxx	Off setting Dept expenditure in General Fund	
Telecommunications								
xx-xx	xxxxx				xxx	60370	Departmental telecommunication expenditure	
78-70	3503	0020		709525		50310	Budgets receipt of reimbursement	
78-70	3503	0020		709525		60200	Budgets offsetting expenditure in telecommunications fund	
Data Processing								
xx-xx	xxxxx				xxx	60380	Departmental data processing expenditures	
78-70	3503	0020		709599		50310	Budgets receipt of Data Processing reimbursement	
78-70	3503	0020		709599		60240	Budgets offsetting expenditures	
Electronic Service Reimbursement								
xx-xx	xxxxx					60420	Departmental Electronics expenditure	
78-60	3501	0020		904200		50310	Receipt of Electronics service reimbursement	
78-60	3501	0020		904200		60240	Budgets offsetting expenditure	
Motor Pool: Use this cost center if you are adding funds for motor pool use.								
xx-xx	xxxxx				xxx	60410	Departmental Motor Pool expenditure	
78-30	3501	0020		904150		50310	Budgets receipt of Motor Pool service reimbursement	
78-30	3501	0020		904150		60240	Budgets offsetting expenditure	
Fleet: Use this cost center if you are adding funds for dedicated program cars.								
xx-xx	xxxxx				xxx	60410	Departmental Fleet expenditure	
78-60	3501	0020		904100		50310	Budgets receipt of Fleet service reimbursement	
78-60	3501	0020		904100		60240	Budgets offsetting expenditure	
Building Management								
xx-xx	xxxxx				xxx	60430	Departmental Building Management expenditure	
78-50	3505	0020		902575		50310	Budgets receipt of Building Management service reimbursement	
78-50	3505	0020		902575		60170	Budgets offsetting expenditure	
Insurance Service Reimbursement								
xx-xx	xxxxx					60140 or 60145	Departmental Insurance expenditure	
72-80	3500	0020		705210		50316	Insurance Revenue	
72-80	3500	0020		705210		60330	Offsetting expenditure	
Lease Payments to Capital Lease Retirement Fund								
xx-xx	xxxxx					60450	Departmental Capital Lease Retirement expenditure Contact your Budget Analyst to complete this.	
Mail & Distribution								
xx-xx	xxxxx				xxx	60460	Mail & Distribution expenditure	
78-20	3504	0020		904400		50310	Budgets receipt of service reimbursement	
78-20	3504	0020		904400		60230	Budgets offsetting expenditure	
Records								
xx-xx	xxxxx				xxx	60460	Records expenditure	
78-20	3504	0020		904500		50310	Budgets receipt of service reimbursement	
78-20	3504	0020		904500		60240	Budgets offsetting expenditure	

How are functional areas assigned to cost objects?

For the most part, functional area is related to what department has recorded the revenue or expenditure (i.e. the District Attorney is reported in Public Safety and Justice). There are some exceptions to this rule that require certain funds to be assigned to a particular functional area, regardless of what department the revenues or expenditures are recorded in.

Functional Area Assignments ~ Based on Fund		
Special Revenue Funds		
1501 - Road Fund	Road & Bridges	0080
1502 - Emergency Communications Fund	Community Services	0060
1503 - Bike Path Fund	Community Services	0060
1504 - Recreation Fund	Community Services	0060
1506 - County School Fund	Community Services	0060
1508 - Animal Control Fund	Community Services	0060
1509 - Willamette River Bridges Fund	Roads & Bridges	0080
1510 - Library Fund	Library	0070
1512 - Land Corner Preservation Fund	Roads & Bridges	0080
1518 - Oregon Historical Society Special Levy	Community Services	0060
1519 - Video Lottery	Community Services	0060
Capital Project Funds		
2504 - Building Project Fund	Community Services	0060
2507 - Capital Improvement Fund	Community Services	0060
2508 - Asset Acquisition Fund	Community Services	0060
2509 - Asset Preservation Fund	Community Services	0060
2511 - Sellwood Bridge Replacement	Roads & Bridges	0080
Enterprise Funds		
3000 - Dunthorpe-Riverdale Svc Dist #14 Fund	Dunthorpe-Riverdale Svc Dist #14	0500
3001 - Mid County Svc Dist #1 Fund	Mid County Svc Dist #1	0510
3002 - Behavioral Health Managed Care Fund	Behavioral Health Managed Care	0520

If a cost object is not in one of the funds listed above, then the functional area should be assigned based on the department that the cost object is in.

Functional Area Assignments ~ Based on Department (Fund Center)		
Non-Dept (10, except 10-50)	General Government	0020
Non-Dept CCFC (10-50)	Social Services	0040
District Attorney (15)	Public Safety & Justice	0050
Countywide (18 & 19)	General Government	0020
Human Services (20, 21, 25, 26, 30 & 31)	Social Services	0040
Health (40)	Health Services	0030
Community Justice (50)	Public Safety & Justice	0050
Sheriff's Office (60)	Public Safety & Justice	0050
County Management (72)	General Government	0020
County Assets (78)	General Government	0020
Library (80)	Library	0070
Community Services (91)	General Government	0020

If you have any questions or comments, please contact Susan Luce in General Ledger at ext. 22138.