



Multnomah County Agenda Placement Request Budget Modification

(Revised 9/23/13)

APPROVED: MULTNOMAH COUNTY

BOARD OF COMMISSIONERS

AGENDA # C-1 DATE 9/22/16

MARINA BAKER, ASST BOARD CLERK

Board Clerk Use Only

Meeting Date: 092216

Agenda Item #: C.1

Est. Start Time: 9:30 am

Date Submitted: 9/6/16

Agenda Title: BUDGET MODIFICATION # HD-05-17: Authorizing four position re-classifications within the Health Department

Requested Meeting Date: September 22, 2016

Time Needed: N/A - Consent

Department: 40 - Health Department

Division: Integrated Clinic Services,
Business Services, Mental
Health & Addiction Services

Contact(s): Robert Stoll – Budget & Finance Manager

Phone: (503) 988-8445

Ext. 88445

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 FY 2017.

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 Finance Specialist 1 to a 1.00 FTE Procurement Analyst, position 715857, in the Business Operations Division of the Health Department. Class Comp approved the reclassification effective 1/1/16 (reclassification #3457). This position is responsible for serving as the subject matter expert and primary point of contact for Health Department staff on Multco Marketplace (MMP); establishing and monitoring the receipt of goods; returning or canceling orders; reviewing and monitoring all MMP invoices to ensure accuracy; working with staff to correct and prevent errors and providing education on order related discrepancies; working with vendors to identify, troubleshoot, and address discrepancies in items ordered and shipped; monitoring vendor activity and ensuring contract compliance; sourcing new vendors, negotiating competitive pricing, and identifying opportunities to reduce and leverage spending; sampling and auditing accounting and financial documents for accuracy and compliance; establishing and maintaining ongoing evaluation with programs about their purchasing needs, and analyzing workflow and

ordering frequency to assist in optimizing use of MMP and reducing purchasing costs; requesting quotes for non-routine purchases; and creating purchase requisitions, release orders, inventory and non-inventory purchase orders and change orders using SAP and SRM systems.
This change impacts program offer 40042 – Contracts & Procurement

Reclassify a 1.00 FTE Data Analyst Senior to a 1.00 FTE Business Process Consultant, position 701073, in the Mental Health & Addictions Services Division of the Health Department. Class Comp approved the reclassification effective 2/9/16 (reclassification #3507). This position is responsible for evaluation and business analysis including functioning as the primary liaison between IT staff, division programs, external customers, external contractors, and software vendors to help coordinate the installation, implementation, use modification, and integration of the EHR; analyzing the present and future business processes and procedures to ensure the EHR is able to support the business need for data collection, tracking, reporting, and compliance; making recommendations for optimization of the EHR Coordinate Evolve Power User Group technology leadership group; tracking and managing oversight of all customer service incoming helpdesk functions for Evolv including process documentation, policy and procedure development, and assigning work tasks; providing technical leadership to the Evolv support team; and providing presentations to leadership.
This change impacts program offer 40068 – Mental Health Quality Management & Protective Services

Reclassify a 0.90 FTE Office Assistant 2 to a 0.90 FTE Office Assistant Senior, position 702980, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 2/9/16 (reclassification #3512). This position is responsible for a wide variety of advanced clerical work including customer service and appointment scheduling; providing information to volunteer organizations regarding refugee intake and screening appointments; evaluating urgent requests for health care appointments for new refugee arrivals; contacting volunteer organizations to coordinate appointments; requesting documentation for state mandated screening processes; supporting the coordination of transportation and interpretation services; providing information to state partners and volunteer organizations regarding primary care and dental services available in Multnomah County; processing and coordinating behavioral and mental health referrals to external providers; performing data entry and maintaining state reporting; preparing invoice reconciliations for the state; and making recommendations to management for process improvements.
This change impacts program offer 40022 – Mid County Health Clinic

Reclassify a 1.00 FTE Finance Specialist Senior to a 1.00 FTE Project Manager, position 716629, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 2/12/16 (reclassification #3526). This position is responsible for leading multi-stakeholder project teams; developing and monitoring adherence to project plan, schedule, and budget; communicating progress to stakeholders; identifying problems, barriers, and possible mitigation; identifying, coordinating, and conducting training related to projects; documenting processes, procedures, and business requirements; preparing and submitting project and/or grant reports or progress reports; providing expertise as a subject matter expert on patient safety, quality improvement, and healthcare transformation projects; developing project charters, business cases, requirement definitions, project plans, business process analysis, performing QA testing, developing acceptance test plans, and executing implementations of new clinical application functionality and associated workflows; evaluating medical coding, billing, and documentation by staff and providers; organizing, defining project scopes, milestones, levels of involvement, staffing, training, and resources; preparing project budgets, staffing plans, and staff resources; participating in PMO meetings, strategic planning, and resource planning; monitoring and communicating project status to leadership, project sponsors, and other stakeholders; and conferring with management as needed to discuss and resolve issues critical to the project's execution and success.
This change impacts program offer 40034 – Quality Assurance

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 the new classifications or other budgeted line items have been adjusted so that the changes are budget neutral.

The reclassification of position 715857 to a Procurement Analyst is budget neutral, because the current budgeted pay for the position falls within the pay-scale of the new classification.

The reclassification of position 701073 to a Business Process Consultant increased budgeted personnel cost by \$3,545, because the step at which the Business Process Consultant is budgeted is higher than the step at which the Data Analyst Senior is budgeted. The increase in cost is offset by a decrease in Temporary, Supplies, and Professional Services, for no net fiscal impact this fiscal year.

The reclassification of position 702980 to an Office Assistant Senior is budget neutral, because the current budgeted pay for the position falls within the pay-scale of the new classification.

The reclassification of position 716629 to a Project Manager increased budgeted personnel cost by \$9,307, because the step at which the Project Manager is budgeted is higher than the step at which the Finance Specialist Senior is budgeted. The increase in cost is offset by a decrease in Temporary, Non Base Fringe, and Non Base Insurance, 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 or other government participation.

N/A

Budget Modification

6. 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

7. What budgets are increased/decreased?

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

- Permanent personnel budget will increase by \$9,215
- Salary related expense budget will increase by \$2,971
- Insurance benefits budget will increase by \$666
- Temporary budget will decrease by \$8,549
- Non Base Fringe budget will decrease by \$1,341
- Non Base Insurance budget will decrease by \$126
- Professional Services budget will decrease by \$709
- Supplies budget will decrease by \$2,661
- Department Indirect budget will increase by \$117

- Central Indirect budget will increase by \$417

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

8. What do the changes accomplish?

Changes of classification for positions 715857, 701073, 702980 and 716629 better fit the duties of these positions as determined by the Class/Comp Unit of Central Human Resources.

9. Do any personnel actions result from this budget modification?

Reclassify a 1.00 FTE Finance Specialist 1 to a 1.00 FTE Procurement Analyst, position 715857, in the Business Operations Division of the Health Department. Class Comp approved #3457.

Reclassify a 1.00 FTE Data Analyst Senior to a 1.00 FTE Business Process Consultant, position 701073, in the Mental Health & Addictions Services Division of the Health Department. Class Comp approved #3507.

Reclassify a 0.90 FTE Office Assistant 2 to a 0.90 FTE Office Assistant Senior, position 702980, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #3512.

Reclassify a 1.00 FTE Finance Specialist Senior to a 1.00 FTE Project Manager, position 716629, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #3526.

10. If a grant, is 100% of the central and department indirect recovered? If not, please explain why.

N/A

11. 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

12. 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 (e.g. cash match, in kind match, reporting requirements, etc)?

N/A

Required Signature

**Elected Official or
Dept. Director:** Joanne Fuller /s/

Date: September 6, 2016

Budget Analyst: Jeff Renfro /s/

Date: September 6, 2016

Department HR: Holly Calhoun /s/

Date: September 6, 2016

Countywide HR: Karie Miller /s/

Date: September 6, 2016

Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: Budmod HD-05-17

Expenditures & Revenues

An increase in revenue is shown as a negative value and a decrease as a positive value for consistency with SAP.

Line No.	Program Offer Number	Fund Code	Fund Center	Func. Area	Cost Object	Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal
1	40022-17	10010	40-70	0030	47550-00-10010	60000 - Permanent	228,539	228,539	0	
2	40022-17	10010	40-70	0030	47550-00-10010	60130 - Salary Related Expns	73,163	73,163	0	
3	40022-17	10010	40-70	0030	47550-00-10010	60140 - Insurance Benefits	71,740	71,740	0	
10010 Total										0
4	40022-17	26030	40-70	0030	47550-00-26030	60000 - Permanent	1,405,274	1,405,274	0	
5	40022-17	26030	40-70	0030	47550-00-26030	60130 - Salary Related Expns	441,375	441,375	0	
6	40022-17	26030	40-70	0030	47550-00-26030	60140 - Insurance Benefits	374,582	374,582	0	
26030 Total										0
40-70 Total										0
					Program Offer Number 40022-17 Total					0
7	40032-17	20500	40-80	0030	4FA52-15-7-3	50170 - IG-OP-Direct Fed	(269,904)	(267,895)	2,009	
8	40032-17	20500	40-80	0030	4FA52-15-7-3	60100 - Temporary	3,693	2,023	(1,670)	
9	40032-17	20500	40-80	0030	4FA52-15-7-3	60135 - Non Base Fringe	826	686	(140)	
10	40032-17	20500	40-80	0030	4FA52-15-7-3	60145 - Non Base Insurance	78	46	(32)	
11	40032-17	20500	40-80	0030	4FA52-15-7-3	60350 - Central Indirect	5,353	5,317	(36)	
12	40032-17	20500	40-80	0030	4FA52-15-7-3	60355 - Dept Indirect	19,183	19,052	(131)	
20500 Total										0
40-80 Total										0
					Program Offer Number 40032-17 Total					0
13	40034-17	20500	40-80	0030	4FA52-15-7-1	50170 - IG-OP-Direct Fed	(438,006)	(440,015)	(2,009)	
14	40034-17	20500	40-80	0030	4FA52-15-7-1	60000 - Permanent	234,491	241,237	6,746	

Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: Budmod HD-05-17

Line No.	Program Offer Number	Fund Code	Fund Center	Func. Area	Cost Object	Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal
15	40034-17	20500	40-80	0030	4FA52-15-7-1	60100 - Temporary	5,998	0	(5,998)	
16	40034-17	20500	40-80	0030	4FA52-15-7-1	60130 - Salary Related Expns	74,727	76,799	2,072	
17	40034-17	20500	40-80	0030	4FA52-15-7-1	60135 - Non Base Fringe	1,341	0	(1,341)	
18	40034-17	20500	40-80	0030	4FA52-15-7-1	60140 - Insurance Benefits	81,506	81,995	489	
19	40034-17	20500	40-80	0030	4FA52-15-7-1	60145 - Non Base Insurance	126	0	(126)	
20	40034-17	20500	40-80	0030	4FA52-15-7-1	60350 - Central Indirect	8,688	8,724	36	
21	40034-17	20500	40-80	0030	4FA52-15-7-1	60355 - Dept Indirect	31,131	31,262	131	
20500 Total										0
40-80 Total										0
Program Offer Number 40034-17 Total										0
22	40042-17	1000	40-90	0030	409155	60000 - Permanent	813,224	813,224	0	
23	40042-17	1000	40-90	0030	409155	60130 - Salary Related Expns	265,120	265,120	0	
24	40042-17	1000	40-90	0030	409155	60140 - Insurance Benefits	254,113	254,113	0	
1000 Total										0
40-90 Total										0
Program Offer Number 40042-17 Total										0
25	40043-17	1000	40-90	0030	409001	50370 - Dept Indirect Rev	(9,865,790)	(9,866,207)	(417)	
26	40043-17	1000	40-90	0030	409001	60100 - Temporary	93,159	93,576	417	
1000 Total										0
40-90 Total										0
Program Offer Number 40043-17 Total										0
27	40068-17	1000	40-10	0030	41405-GF	60000 - Permanent	258,178	258,672	494	
28	40068-17	1000	40-10	0030	41405-GF	60130 - Salary Related Expns	84,281	84,461	180	

Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: Budmod HD-05-17

Line No.	Program Offer Number	Fund Code	Fund Center	Func. Area	Cost Object	Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal
29	40068-17	1000	40-10	0030	41405-GF	60140 - Insurance Benefits	79,776	79,811	35	
1000 Total										709
30	40068-17	3002	40-10	0520	41405-00-3002	60000 - Permanent	686,577	688,058	1,481	
31	40068-17	3002	40-10	0520	41405-00-3002	60130 - Salary Related Expns	222,448	222,987	539	
32	40068-17	3002	40-10	0520	41405-00-3002	60140 - Insurance Benefits	207,289	207,396	107	
33	40068-17	3002	40-10	0520	41405-00-3002	60240 - Supplies	3,717	1,056	(2,661)	
34	40068-17	3002	40-10	0520	41405-00-3002	60350 - Central Indirect	29,410	29,527	117	
35	40068-17	3002	40-10	0520	41405-00-3002	60355 - Dept Indirect	105,387	105,804	417	
3002 Total										0
36	40068-17	82037	40-10	0030	4MH04-19	50180 - IG-OP-Direct St	(167,238)	(166,529)	709	
37	40068-17	82037	40-10	0030	4MH04-19	60170 - Professional Svcs	8,003	7,294	(709)	
38	40068-17	82037	40-10	0030	4MH04-20	50180 - IG-OP-Direct St	(347,968)	(348,677)	(709)	
39	40068-17	82037	40-10	0030	4MH04-20	60000 - Permanent	214,685	215,179	494	
40	40068-17	82037	40-10	0030	4MH04-20	60130 - Salary Related Expns	72,717	72,897	180	
41	40068-17	82037	40-10	0030	4MH04-20	60140 - Insurance Benefits	60,566	60,601	35	
82037 Total										0
40-10 Total										709
Program Offer Number 40068-17 Total										709
42	40072-17	1000	40-10	0030	41514-GF	60100 - Temporary	86,669	85,960	(709)	
1000 Total										(709)
40-10 Total										(709)
Program Offer Number 40072-17 Total										(709)

Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: Budmod HD-05-17

Line No.	Program Offer Number	Fund Code	Fund Center	Func. Area	Cost Object	Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal
43	72020-17	3500	72-80	0020	705210	50316 - Svc Rmb Med/Dental	(77,654,494)	(77,655,002)	(508)	
44	72020-17	3500	72-80	0020	705210	60330 - Claims Paid	12,203,147	12,203,655	508	
3500 Total										0
72-80 Total										0
Program Offer Number 72020-17 Total										0
45	95000-17	1000	19	0020	9500001000	60470 - Contingency	12,639,396	12,639,513	117	
1000 Total										117
19 Total										117
Program Offer Number 95000-17 Total										117
46	95001-17	1000	19	0020	9500001000	50310 - Intl Svc Reimburse	(6,037,248)	(6,037,365)	(117)	
1000 Total										(117)
19 Total										(117)
Program Offer Number 95001-17 Total										(117)

Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: Budmod HD-05-17

Annualized Personnel Changes

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

						Annualized				
Position Number	JCN	JCN Description	HR Org	Fund	Cost Object Number	FTE	Base Pay (60000)	Fringe (60130)	Insurance (60140)	Total
701073	6456	Data Analyst/Sr	63307	3002	41405-00-3002	(0.60)	(49,102)	(17,853)	(12,561)	(79,516)
701073	6456	Data Analyst/Sr	63307	1000	41405-GF	(0.20)	(16,367)	(5,951)	(4,187)	(26,505)
701073	6456	Data Analyst/Sr	63307	82037	4MH04-20	(0.20)	(16,367)	(5,951)	(4,187)	(26,505)
701073	6501	Business Process Consultant	63307	3002	41405-00-3002	0.60	50,583	18,392	12,668	81,643
701073	6501	Business Process Consultant	63307	1000	41405-GF	0.20	16,861	6,131	4,222	27,214
701073	6501	Business Process Consultant	63307	82037	4MH04-20	0.20	16,861	6,131	4,222	27,214
702980	6001	Office Assistant 2	65188	10010	47550-00-10010	(0.70)	(29,008)	(10,547)	(13,771)	(53,326)
702980	6001	Office Assistant 2	65188	26030	47550-00-26030	(0.20)	(8,287)	(3,013)	(3,934)	(15,234)
702980	6002	Office Assistant/Sr	65188	10010	47550-00-10010	0.70	29,008	10,547	13,771	53,326
702980	6002	Office Assistant/Sr	65188	26030	47550-00-26030	0.20	8,287	3,013	3,934	15,234
715857	6029	Finance Specialist 1	63186	1000	409155	(1.00)	(55,675)	(17,098)	(19,037)	(91,810)
715857	6112	Procurement Analyst	63186	1000	409155	1.00	55,675	17,098	19,037	91,810
716629	6032	Finance Specialist/Sr	67202	20500	4FA52-15-7-1	(1.00)	(63,785)	(19,588)	(19,625)	(102,998)
716629	6063	Project Manager	67202	20500	4FA52-15-7-1	1.00	70,531	21,660	20,114	112,305
Total Annualized Changes:						0.00	\$9,215	\$2,971	\$666	\$12,852

Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: Budmod HD-05-17

Current Year Personnel Changes

Cost/savings that will take place in this FY; these explain the actual dollar amounts being changed by this BudMod.

						Current Year				
Position Number	JCN	JCN Description	HR Org	Fund	Cost Object Number	FTE	Base Pay (60000)	Fringe (60130)	Insurance (60140)	Total
701073	6456	Data Analyst/Sr	63307	3002	41405-00-3002	(0.60)	(49,102)	(17,853)	(12,561)	(79,516)
701073	6456	Data Analyst/Sr	63307	1000	41405-GF	(0.20)	(16,367)	(5,951)	(4,187)	(26,505)
701073	6456	Data Analyst/Sr	63307	82037	4MH04-20	(0.20)	(16,367)	(5,951)	(4,187)	(26,505)
701073	6501	Business Process Consultant	63307	3002	41405-00-3002	0.60	50,583	18,392	12,668	81,643
701073	6501	Business Process Consultant	63307	1000	41405-GF	0.20	16,861	6,131	4,222	27,214
701073	6501	Business Process Consultant	63307	82037	4MH04-20	0.20	16,861	6,131	4,222	27,214
702980	6001	Office Assistant 2	65188	10010	47550-00-10010	(0.70)	(29,008)	(10,547)	(13,771)	(53,326)
702980	6001	Office Assistant 2	65188	26030	47550-00-26030	(0.20)	(8,287)	(3,013)	(3,934)	(15,234)
702980	6002	Office Assistant/Sr	65188	10010	47550-00-10010	0.70	29,008	10,547	13,771	53,326
702980	6002	Office Assistant/Sr	65188	26030	47550-00-26030	0.20	8,287	3,013	3,934	15,234
715857	6029	Finance Specialist 1	63186	1000	409155	(1.00)	(55,675)	(17,098)	(19,037)	(91,810)
715857	6112	Procurement Analyst	63186	1000	409155	1.00	55,675	17,098	19,037	91,810
716629	6032	Finance Specialist/Sr	67202	20500	4FA52-15-7-1	(1.00)	(63,785)	(19,588)	(19,625)	(102,998)
716629	6063	Project Manager	67202	20500	4FA52-15-7-1	1.00	70,531	21,660	20,114	112,305
Total Current FY Changes:						0.00	\$9,215	\$2,971	\$666	\$12,852