



Senior Probate Examiner

Class Code: 5024

Bargaining Unit: Unrepresented Non-management

SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA
Established Date: December 13, 2022

SALARY RANGE

SEE SALARY SCHEDULE

JOB DESCRIPTION:

JOB DEFINITION

Under direction, to provide procedural review of the most complex, difficult and specialized probate matters to ensure that all cases are complete and in compliance with statutes and local rules; to provide lead direction and training for Probate Examiners; to prepare reports and to make recommendations to judicial officers; to assign calendared matters for review by Probate Examiner staff and to perform other related duties as assigned.

DISTINGUISHING FEATURES

This is the lead worker level in the Probate Examiner classification series that reports to the Probate Court Manager. This position is distinguished from the lower level classification of Probate Examiner in that the Senior Probate Examiner is responsible for performing the more difficult, complex, and specialized work; assists with planning, organizing, coordinating and assigning the work activities of the unit and provides guidance and direction to other Probate Examiners. This classification is distinguished from the higher-level classification of Probate Court Manager in that the latter has full supervisory authority of the Investigators and Probate Examiners.

EXAMPLES OF DUTIES:

NOTE: The following are duties performed by employees in this classification. However, employees may perform other duties at an equivalent level. Each individual in the classification does not necessarily perform all the duties listed.

1. Serves as an assistant to the Probate Court Manager; assists in the day-to-day operation of the Examiner's Office, including planning, organizing, coordinating and assigning the distribution of work among the Probate Examiners; performs the more difficult, complex and specialized work of the Probate Examiner; serves as a coach in individual and team development; and may provide leadership or act in the Probate Court Manager's absence.
2. Assists in developing, maintaining and updating training materials, procedures, policies, manuals and forms in response to changes in the law and/or court practices; assesses and makes recommendations on training needs.
3. Provides training, work leadership, direction, guidance and technical assistance to the Probate Examiners; monitors changes in the law; recommends policy and procedural changes required for compliance and initiates modifications after approval.
4. Reviews probate cases that involve calendared and ex parte conservatorship, guardianship, trust and estate matters for procedural and technical deficiencies and necessary court action; advises attorneys, litigants and/or staff of judicial actions and procedural defects in filings; briefs judicial officers on outstanding items, unusual cases; and performs research as requested.
5. Analyzes legal documents for technical and procedural accuracy; summarizes petitions and makes recommendations to the Judicial Officer.
6. Reviews and makes recommendations in matters that are in order and can be granted on the verified petition; prepares lists for pre-granted matters.
7. Clarifies procedural issues and provides information in person, by email and telephone about probate procedures, calendars and specific cases.
8. Performs other related duties as assigned.

MINIMUM QUALIFICATIONS:

Option I

Education:

A bachelor of arts or bachelor of science degree from an accredited educational institution.

And

Experience:

A minimum of two (2) years' of full-time experience as a Probate Examiner with the Superior Court of California, County of Alameda.

Or Option II

Education and Experience:

(1) A bachelor of arts or bachelor of science degree from an accredited educational institution and a minimum of four (4) years' of full-time employment experience with one or more of the following employers:

- (A) A court;
- (B) A public or private law office; or
- (C) A public administrator, public guardian, public conservator, or private professional fiduciary.

(2) A paralegal certificate or an Associate of Arts degree from an accredited educational institution and a minimum of a total of six (6) years' employment experience with one or more of the employers listed in (1); or

(3) A juris doctor degree from an educational institution approved by the American Bar Association or accredited by the Committee of Bar Examiners of the State Bar of California and a minimum of two and a half (2.5) years' employment experience with one or more of the employers listed in (1).

In addition to the above, candidates must meet all of the qualifications of a probate examiner as set forth in rule 10.777 of the California Rules of Court and any other applicable legal authority.

KNOWLEDGE AND ABILITIES:

Knowledge of California Probate Code, other California codes and court rules pertaining to probate matters; court procedures; legal terminology and documents; legal office procedures; correct English usage, punctuation, spelling and grammar; modern office equipment, including computer software programs, technology tools, fax machine and copier.

Ability to understand, interpret and apply pertinent provisions of the Probate Code, Civil Code, and other California Codes, Judicial Council and Superior Court rules and procedures including Title 7 of the California Rules of Court; understand complex issues; analyze problems and documents and make appropriate recommendations; communicate effectively, both orally and in

writing with Judicial Officers, attorneys, staff and members of the public; use initiative and exercise sound judgment; plan and organize work to meet deadlines; effectively and professionally represent the court in answering questions, responding to inquiries and dealing with concerns from Judicial Officers, court and county staff, vendors and external agencies; maintain confidentiality of information; and operate modern office equipment including, telephone, computer, printer, copier and fax machine.

CLASSIFICATION HISTORY:

Date established: 12/13/22