



Supervising Probate Examiner

Class Code:
4868

Bargaining Unit: Unrepresented - Management

SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA
Established Date: Mar 1, 2009
Revision Date: Feb 13, 2009

SALARY RANGE

SEE SALARY SCHEDULE

JOB DESCRIPTION:

JOB DEFINITION

Under direction, to supervise the staff engaged in conducting probate examiner duties; to review probate files for procedural deficiencies; to advise attorneys of deficiencies; to provide recommendations to Judicial Officer; and to perform other related duties as assigned.

EXAMPLES OF DUTIES:

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

1. Assigns work and ensures time lines are met; develops policy and procedures in response to changes in the law, Judges requests, and to improve efficiency and functioning of the office; serves as liaison to the probate judges; develops, updates and revises forms and materials used by the probate examiners and the Court.
2. Provides training, support and supervision of probate examiner staff; consults with staff on difficult and high profile cases; evaluates employees' work performance and work behavior; provides feedback, on formal and informal basis, to increase staff competency and learning; recommends disciplinary action; approves leave time and reviews time sheets.
3. Reviews probate files that involve calendared and ex parte conservatorship, guardianship, trust and estate matters for procedural and technical deficiencies and necessary court action; advises attorneys or staff of deficiencies and procedural problems.
4. Analyzes legal documents for technical and procedural accuracy, summarizes petitions and makes recommendations to the Judicial Officer.

5. Reviews and approves orders that can be granted without court appearance; prepares lists and tapes for pre-granted matters; appoints probate referees.
6. Clarifies procedural issues and provides information in person and by telephone about probate procedures, calendar, and specific cases.
7. Reviews cases with Judicial Officer; advises of outstanding problems; performs research as requested; contacts attorneys to advise of Judge's requirements.
8. Monitors cases during court session; reviews additional documents; provides recommendation to Judge while on bench.
9. Performs other related duties as assigned.

MINIMUM QUALIFICATIONS:

Education:

A certificate of completion from an approved paralegal program.

And

Experience:

The equivalent to four years of full-time experience reviewing documents in a court or law office; one year of lead or supervisory experience.

KNOWLEDGE AND ABILITIES:

Knowledge of supervision practices; California Probate Code, other California codes and court rules pertaining to probate matters; court procedures; legal terminology and documents; legal office procedures.

Ability to train, supervise, plan and organize work of others; develop policy and procedure, understand, interpret and apply pertinent provisions of the Probate Code, Civil Code, and other California Codes, Judicial Council and Superior Court rules and procedures; understand complex issues; interpret information from various sources; analyze problems and documents and make recommendations; plan and organize work to meet deadlines.

CLASSIFICATION HISTORY:

Date established: 3/01