

NUMBER:	4.7
SUBJECT:	LEAD CLERK
CATEGORY:	CASE SECTION
DATE:	May 20, 2011
DATE REVISED:	May 28, 2014, March 17, 2015
RELATED SECTIONS:	EMPLOYEE HANDBOOK, ARCHIVING GROUP E-MAIL ACCOUNTS (2.16.2), EMERGENCY TELEPHONE LOG BINDER, EMERGENCY RESPONSE PLAN HANDBOOK
IN COMPLIANCE WITH:	N/A

POLICY:

To standardize the responsibilities and duties performed by the lead clerk assigned to each shift.

PURPOSE:

The lead clerk will be assigned by the shift supervisor on a daily basis. The lead clerk will be responsible for monitoring the daily operational activity and workflow of staff assigned to their appropriate shift in the absence of the shift supervisor.

ASSIGNED DUTIES:

A. INCOMING US MAIL

The lead clerk is responsible for picking up the incoming US and County mail from designated unit basket located in the mailroom. The process is as follows:
 Check for incoming mail. Dayshift should check mail twice during shift no later than 8:30 AM. and no later than 12:30 PM., PM shift will check the mail no later than 2:30 PM and again at 9:00 PM before Midshift takes over. There may be times when the mail delivery changes. The lead is expected to use good judgment when opening mail addressed to Records Cases.

B. RESPONSIBILITY

Lead will write his/her name on white board for the sake of others being able to easily identify the lead. The lead will be responsible for the following tasks:

- Assist other sections with questions and incoming/pending requests.
- Assist co-workers with the more complicated tasks, if needed.
- Sort incoming mail for Cases Section.
- Thoroughly review mail correspondence.
 - Mail addressed to supervisors **should not** be opened unless authorized by a supervisor.
 - Place mail in the designated supervisor's inbox.
 - Mail addressed to staff **should not** be opened.
 - Place staff member's mail in their immediate supervisor's inbox.
- Log all incoming mail for Cases into the electronic Correspondence log.
- Monitor the Correspondence accordion folder

- Pull old request from the folder and place overdue requests in the ASAP Correspondence tray/slot.
- If the lead clerk is unable to resolve a problem he/she will refer the problem to a Case section supervisor for follow-up.
- In the absence of the Cases supervisor non-critical issues shall be held until the next Cases supervisor comes on duty while time sensitive or critical issues will require contacting an on duty supervisor or on duty Sheriff's Operations Supervisor (SOS). If no supervisor or SOS is available call your supervisor or SOS at home for instructions.

C. BRIEFING ONCOMING SHIFT

In absence of immediate supervisor the lead clerk is responsible for briefing the oncoming supervisor or in the absence of the shift supervisor, the oncoming lead clerk of any important issues and/or problems that may continue to affect the oncoming shift.

D. ON THE JOB INJURIES

In the event that an employee is injured on the job during the course of duty, the lead clerk will inform the employee to immediately notify any on duty supervisor of the injury.

- The on duty supervisor will be responsible for ensuring the appropriate forms are completed and forwarded to the employee's immediate supervisor.
- In the absence of a supervisor, the lead clerk will send a detailed e-mail regarding the incident and the employee involved to the immediate supervisor for follow-up.

**Note that "Medical Disability Status Report" forms are located in the front of the Emergency Telephone Log Binder and will be given to the employee in cases where the employee seeks medical attention.*

E. WEEKLY SCHEDULE/ASSIGNMENTS

In the absence of an on duty Cases supervisor the lead will make necessary adjustments or changes to scheduled tasks. The lead clerk will send a detailed e-mail to all three Cases supervisors regarding the changes.

F. EMERGENCY EVACUATION PROCEDURES

In the event of an emergency and in the absence of a supervisor, the lead clerk is responsible for ensuring co-workers immediately exit the building and report to the designated staging area. The lead clerk will also ensure that the following general procedures are followed:

1. The lead clerk will ensure that staff quickly move to the designated staging area as follows:
 - Daytime staging area is located down the driveway to the grassy area.
 - After hours staging area is located by the connex storage container in the parking lot.
2. Once everyone has reached the designated staging area, the lead clerk will take roll and report the roll call status to the Cal ID personnel.
3. For additional information refer to the Emergency Response Plan Handbook.