October 2018
FLSA: NON-EXEMPT
CLASS CODE: 90247

PROBATE EXAMINER

DEFINITION

Under general supervision, ensures that probate documents comply with procedural requirements, requisite statues, court rules and court policies; examines probate files and documents in pending probate matters for procedural deficiencies, verifying proper form and content; prepares analyses and reviews for judicial officers; works with attorneys and petitioners to resolve problems; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

This is an experienced-level specialist class in the Probate Department responsible for a variety of reviews and analyses of pending probate cases prior to hearing in court. Positions in this class are responsible for providing technical, procedural and legal review of files, forms and pleadings to ensure that matters before the court are procedurally and substantively complete, and to provide recommendations regarding those matters to the judicial officer.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the rights to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Examines, reviews and evaluates probate filings in conservatorships, guardianships, trust and estate cases for procedural deficiencies and necessary court action.
- Reviews accountings for accuracy and completeness; reviews values of assets and ensures assets are accounted for; reviews schedules of payments and receipts for discrepancies.
- Generates court calendars; prepares and issues tentative rulings on matters pending the hearing.
- Answers questions from the public, including attorneys and self-represented litigants, around procedural issues; assists self-represented parties in resolving procedural issues.
- Monitors cases during court session, reviews documents while in court and provides recommendations to the judicial officer; advises judicial officer of outstanding issues with the cases.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures including California Probate Code, other California codes and Judicial Council and Superior Court rules pertaining to probate matters.
- Court procedures, legal terminology and documents and legal office procedures.

- General accounting principles and practices.
- Modern office practices, methods, and computer equipment and applications related to work, including word processing and spreadsheet software.
- English usage, grammar, spelling, vocabulary, and punctuation.

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.
- Understand complex issues, analyze problems and documents and make recommendations.
- Write comprehensive, factually accurate tentative rulings and judge recommendations.
- Plan and organize work to meet deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of experience and education/training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Equivalent to a Bachelor's degree from an accredited college or university and two (2) years of experience with a court, public or private law office in a probate-related capacity or a public guardian or conservator or private professional fiduciary.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups and over the telephone. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard, typewriter keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds with the use of proper equipment.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.