

PROBATE EXAMINER

DEFINITION

Under general direction, to examine files and documents in pending probate matters set for hearing in court, verifying proper form and content; to ensure that probate documents comply with procedural requirements, requisite statutes, court rules, and court policies; to prepare analyses and reviews for judicial officers; to work with attorneys and petitioners to resolve problems; and to do related work as required.

DISTINGUISHING CHARACTERISTICS

This is a specialist class for performing a variety of reviews and analyses of pending probate cases prior to hearing in court. Incumbents prepare analyses and reviews of cases for judicial officers and work with attorneys and petitioners to resolve problems.

REPORTS TO

Assistant Director, Probate or Director, Probate.

CLASSIFICATIONS SUPERVISED

This is not a supervisory class.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES *(The following is used as a partial description and is not restrictive as to duties required.)*

Examines a variety of forms and documents related to probate cases for proper form and content; ensures that forms and documents comply with requisite statutes, court rules, and court policies; recommends for court approval, all matters which are in order and may be approved on a verified petition with or without an appearance by the attorney of record; prepares written analyses and calendar notes for judicial officers, identifying deficiencies and discrepancies detected during file and document examinations; may attend court hearings on probate matters examined; advises attorneys and petitioners regarding requirements which must be met prior to court proceedings; may work with attorneys and petitioners to resolve deficiencies and discrepancies in pending probate matters; performs a variety of research and briefs Probate Judicial Officers regarding unusual case issues prior to hearings.

TYPICAL PHYSICAL REQUIREMENTS

Sit for extended periods; frequently stand and walk; normal manual dexterity and eye-hand coordination; lift and move objects weighing up to 25 lbs.; corrected hearing and vision to normal

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range; verbal communication; use of office equipment, including computer, telephone, calculator, copiers, and FAX.

TYPICAL WORKING CONDITIONS

Work is performed in an office environment and court room environment; continuous contact with other staff and the public.

DESIRABLE QUALIFICATIONS

Knowledge of:

- Provisions of the California Probate Code, Code of Civil Procedure, relevant statutes and rules of the California Judicial Council and the Superior Court of California, County of San Francisco, and other statutes relevant to document examination for probate cases.
- Legal terminology and pleadings relevant to probate cases.
- Legal procedures and requirements for filing documents in probate court.
- Accounting and bookkeeping principles applicable to probate cases.
- Basic knowledge of personal computers and software applicable to probate case analysis.

Ability to:

- Examine and validate the contents of probate documents for consistency with statute and procedural requirements.
- Understand, interpret, and apply pertinent provisions of statutes, rules, and policies applicable to probate cases.
- Perform a variety of complex document and case analysis and effectively communicate findings both orally and in writing.
- Perform basic reviews and analysis of financial and accounting information.
- Work effectively with people from a variety of socioeconomic backgrounds.
- Develop objective analyses and recommendations for use by judicial officers.
- Effectively represent the Superior Court of California, County of San Francisco and the Probate Court with the public, attorneys, petitioners, and representatives of other government agencies and court systems.
- Maintain confidential information when required by legal or ethical standards.
- Establish and maintain cooperative working relationships.

Training and Experience:

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

Five years of responsible work experience as a probate paralegal performing legal and financial document examination and analysis, preferably including direct experience in working with documents and procedures related to probate cases.

Education equivalent to graduation from an accredited college or university with a Bachelor of Arts or Bachelor of Science degree in social science, political science, accounting, business, or a closely related field.

Special Requirements:

An incumbent may be required to pass a criminal history background check. Information discovered through such a background check may become grounds for dismissal from employment.

The contents of this class specification shall not be construed to constitute any expressed or implied warranty or guarantee, nor shall it constitute a contract of employment. The contents of this specification may be modified or revoked without notice. Terms and conditions of employment are "at will" employment at the pleasure of the Judges of the Superior Court of California, County of San Francisco.