

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

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|----------------------|------------------------------------|----------------|
| CLASSIFICATION TITLE | OFFICE/BRANCH/SECTION | |
| Personnel Specialist | DHR/Office of Transaction Services | |
| WORKING TITLE | POSITION NUMBER | EFFECTIVE DATE |
| Personnel Specialist | 702-008-1303-xxx | 07/01/2015 |

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the supervision of a Personnel Supervisor I, the Personnel Specialist performs transaction-related activities for a group of employees in assigned agency codes and reporting units. The Specialist demonstrates a positive attitude and a commitment to provide quality service that is accurate, timely, and exceeds our customers' expectations.

TYPICAL DUTIES:

| Percentage | | Job Description |
|-----------------------------------------|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Essential (E)/Marginal (M) ¹ | | |
| 25% | E | Makes appropriate salary determinations for appointment transactions. Prepares transactions documents for appointments, separations, and miscellaneous changes. Keys information into the State Controllers Office decentralized automated system. Prepares and routes probationary reports of performance and annual appraisal forms |
| 25% | E | Processes payroll documents including computing net pay for salary advances. Completes payroll adjustment notices (underpayments and overpayments). Completes payroll processes for Non-industrial Disability Leave, overtime, garnishments, special pay and shift differential. Researches and resolves pay problems. |
| | | Maintains and monitors range changes, MSAs/SISAs, appointments and leave expiration dates, employee return of Notice of Personnel Action (NOPA), and intermittent and part-time probationary report due dates. |
| | | Records additions, deletions, and/or omissions to monthly attendance reports (Form 672). Reconciles attendance to monthly payroll warrant registers. Prepares exceptions to payroll and releases warrants |
| 20% | E | Attend training sessions as required. May serve as lead in the unit and act as the backup to the supervisor in his/her absence. Acts in a lead capacity to train and mentor new and lesser experienced staff, providing feedback and recommendations to both the employee and the supervisor. |
| 15% | E | Maintains leave accounting and hours-worked records on part-time and intermittent employees and retired annuitants. Reconciles leave balance reports and completes input and correction documents as needed to ensure each employee's leave record information is current and correct. |
| 10% | E | Processes benefits including review of eligibility requirements, advises employees, and processes forms for health, dental, flex-elect, long term disability, COBRA, legal services, family medical leave act, direct deposit, and various other benefits. |
| 5% | M | Reads, implements, maintains, and files all revisions to control agency manuals, memos, pay letters, and procedures. Maintains and files warrant registers, pay requests, attendance forms, official personnel documents. |

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

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SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None. May function as a lead over less experienced staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must be familiar with the Department's mission and goals, possess knowledge of transactions methods, monitor data, and must be computer literate (preferably with experience in Windows and Office Suite, including Excel). The incumbent must be able to reason logically and creatively; present ideas and information orally, in writing, and presentation format; maintain accurate records; learn and apply personal computer and data information systems; and determine priorities. The incumbent must be able to interpret civil laws and rules and various personnel manuals from SCO, PERS, and CalHR as well as departmental procedures and bargaining unit MOUs.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for effectively planning, coordinating, and executing personnel transactions functions as they relate to the Office of Transactions Services. Poor judgment in monitoring, evaluating and reporting information could affect the quality of personnel and payroll-related services to internal and external customers.

The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employee's confidential information may damage DHR's reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

PUBLIC AND INTERNAL CONTACTS

The incumbent will work with all levels of Caltrans staff and management, consultants, private sector groups and representative of State control agencies. The incumbent must work with others in a cooperative manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal. Employee must maintain cooperative working relationships with staff as well as other departmental employees, must respond appropriately to difficult situations, must recognize emotionally charged issues or problems, and must facilitate effective solutions. May on occasion need to assist in movement of boxes or other miscellaneous office supplies and will need to be able to lift items weighing five to ten pounds. Must adjust rapidly to new situations warranting attention and resolution.

WORK ENVIRONMENT

The incumbent will work in a climate-controlled office under artificial lighting. The work site may have limited viewing access to the outdoors and the incumbent may be assigned cubicle space as a base of operation.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

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SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE
