

**CALIFORNIA DEPARTMENT OF TRANSPORTATION  
Duty Statement**

<b>CLASSIFICATION TITLE</b> Personnel Technician I		<b>DISTRICT/DIVISION/OFF</b> Division of Human Resources
<b>WORKING TITLE</b> Transactions Liaison, Sacramento	<b>POSITION NUMBER</b> 702-008-5160-	<b>EFFECTIVE DATE</b>

**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 general direction of a Division of Human Resources (DHR) Office Chief, a Staff Services Manager II, the incumbent serves as the liaison for personnel/payroll issues between headquarters employees and the Division of Human Resources, Office of Transactions Services; disseminates personnel/payroll information and receives and distributes personnel-related documents to designated staff. The Transactions Liaison handles pre-employment and benefits documents for new employees to the department, and is the primary contact for headquarters staff in regard to personnel/payroll information. The Transactions Liaison demonstrates a positive attitude, a commitment to providing high quality customer service that is accurate, timely, and exceeds our customers' expectations, and maintains complete confidentiality.

**TYPICAL DUTIES:**

Essential Tasks

40% Incumbent provides support to managers, supervisors, and employees answering questions related to benefits, pay and leave balances, retirement, and any other benefit-related personnel matter. As the liaison for the personnel specialists in the Office of Transactions Services (OTS), the incumbent performs the necessary research required to resolve benefit-related questions, and refers all technical questions to the personnel specialist. The Transactions Liaison answers employee's questions pertaining to forms, and assists them with the completion of required forms to make benefit and/or payroll changes. The incumbent ensures that all personnel documents are completed accurately and submitted to the assigned personnel specialist on the same day or no later than the following business day. Incumbent provides information and answers questions on all benefit-related programs available to State employees. The Transactions Liaison works with DHR hiring analyst to independently collect, approve and distribute pre-employment clearance documents for new hires, and reviews hiring documents for completeness for Sacramento positions

- 25% Incumbent acts as the Department's liaison for all Health Questionnaires that require review by the California Department of Human Resources (CalHR) State Medical Officer, and ensures all Department employees' medical examination documents are completed thoroughly before referring to CalHR. As the liaison to CalHR, the incumbent is responsible for working directly with the District Liaisons and serving as the point-of-contact person for the Department regarding medical evaluations referred to CalHR. Incumbent is responsible for logging and tracking all referrals so that DHR can reconcile referrals with the monthly invoice from CalHR. As documents are received from CalHR, the Transactions Liaison will return the completed medical evaluations to the District Liaisons. As requested, follow-up with CalHR and provide review status to the District Liaison. In addition, the Transactions Liaison evaluates and reviews all medical evaluations for Sacramento hires and determines whether all criteria are met to clear for hiring. If referrals are made to CalHR, the incumbent notifies the hiring authority of the status as received from CalHR. At all times, the Transactions Liaison ensures that all medical evaluations are kept secure and handles each with complete confidentiality.
- 10% (E) Conducts individual and group training sessions relating to various aspects of pay and leave processing procedures. Answers a wide variety of personnel questions via telephone, email and in person.
- 10% (E) Conducts individual orientation sessions for new employees. Reviews with employees the benefits available to them as State of California employees. Make presentations as part of Department New Employee Orientation Program and revises presentation materials as needed.
- 5% (M) Provides coverage for the reception desk and front counter.

### **SUPERVISION EXERCISED OVER OTHERS**

This position does not supervise; however, the incumbent may act in a lead capacity over clerical support staff.

### **KNOWLEDGE, ABILITIES AND ANALYTICAL REQUIREMENTS**

The incumbent should have knowledge of Caltrans hiring process, including a familiarity with the roles and responsibilities of various individuals or programs involved in the hiring process. The Transactions Liaison should be familiar with the various hiring documents and the laws and rules governing the hiring process. They should have an understanding both of Caltrans Sacramento organization and Caltrans mission and goals. They should be proficient in Excel, Word, Lotus Notes, TRS, and the Internet. The incumbent must be able to: express ideas and present information both orally and in writing to individuals and groups; act independently; develop and maintain cooperative working relationships; interact efficiently and courteously with various levels of staff. The Liaison should be skilled in organizing and maintaining divergent types of information.

The incumbent evaluates proposed appointments and determines what pre-employment documents are required. As the documents are completed, the Liaison will review and determine if the established criteria are met. This may involve brief research on the Internet and contact with the State Personnel Board's Medical Office.

The Transactions Liaison must demonstrate a positive attitude and a commitment to providing excellent customer service in a professional manner.

### **CONSEQUENCE OF ERROR/RESPONSIBILITY FOR DECISIONS**

The Transactions Liaison is the primary contact for new employees, and as such is often the first impression of Caltrans employees receive. A strong commitment to customer service is a must. Lack of timely processing of documents could delay the employees start date or commencement of benefits. Poor customer service could adversely affect the image of the Department with new employees.

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 Transactions Liaison has daily contact with all levels of employees, and is expected to exercise tact, discretion, and excellent communication skills.

### **PHYSICAL, MENTAL AND EMOTIONAL REQUIREMENTS**

Employees may be required to sit for long periods of time using a keyboard and video display terminal. This position requires patience and understanding when dealing with a high volume of requests from a diverse group of people.

### **WORK ENVIRONMENT**

Employee will work in a climate-controlled office under artificial lighting.

I have read and understand the duties listed above and can perform them with/without Reasonable Accommodation (RA). (If you believe you may require Reasonable Accommodation, please discuss this with the hiring supervisor. If you are unsure whether you require Reasonable Accommodation, inform the hiring supervisor, who will discuss your concerns with the RA Coordinator.)

\_\_\_\_\_  
Employee Name (please print)

\_\_\_\_\_  
Employee signature                      Date

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

\_\_\_\_\_  
Supervisor Name (please print)

\_\_\_\_\_  
Supervisor signature                      Date