

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

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| CLASSIFICATION TITLE Personnel Technician I | OFFICE BRANCH/SECTION District 1 / Administration / Administrative Services | |
| WORKING TITLE District 1 -Transaction Liaison | POSITION NUMBER 901-001-5160-xxx | EFFECTIVE DATE January 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 the Administrative Services Chief, a Staff Services Manager I, the incumbent will assist District 1 employees, as well as in-house North Region and Headquarters employees with benefits and payroll needs; will perform New Hire Orientation meetings. The incumbent will serve as liaison between employees and the Transactions Unit in the headquarters Division of Human Resources; will administer and monitor payroll distribution to employees; will receive and distribute personnel-related documents and information to appropriate designated staff.

TYPICAL DUTIES:

| Percentage | Essential (E)/Marginal (M) ¹ | Job Description |
|------------|---|---|
| 20% | E | Provide assistance to employee's questions and issues related to payroll; health, dental, and vision benefits; salary; and hiring. Assist employees with the completion of personnel-related forms. Distribute brochures, literature, website information, and appropriate forms detailing various personnel, payroll, and benefit programs. Serve as liaison between employees and/or supervisors and the Division of Human Resources (DHR) in the receipt and distribution of various confidential personnel-related documents such as Individual Development Plans (IDP), Probationary Reports, Merit Salary Adjustments (MSA), Range Change approvals, Notice of Personnel Action (NOPA), and benefit forms. Provide employees with necessary forms to continue benefits into retirement. Maintain spreadsheets and track data relating to probation reports, IDPs, position number changes, and benefit-related documents forwarded to headquarters. |
| 20% | E | District 1 Staff Central Liaison: Provide training and guidance to unit timekeepers in areas of timekeeping duties; provide support to employees, supervisors or managers in responding to Staff Central issues and questions. Assist in resolving employee leave balance discrepancies, and coordinate the resolution of payroll issues. |
| 10% | E | Maintain up-to-date New Employee Orientation packets, conduct New Employee Orientation meetings, and assist with the completion of necessary benefit forms and other personnel forms. Review for accuracy and forward completed forms to Transactions Unit for processing. Register employees in TOPPS and notify appropriate district programs of the new hire. |
| 10% | E | Payroll Coordinator: Research and analyze payroll issues such as: salary rate, overtime pay warrants, travel expenditures, payroll garnishment, and payroll advance checks; coordinate resolution of these issues with the Transactions Unit. After receiving payroll from State Controller's Office and/or the Division of Accounting, review and reconcile the coordinating payroll spreadsheets and pay warrants that correlate to each employee within a division/unit. Research and verify monthly staffing changes, such as: promotions, transfers, relocations, separations, and retirements that would affect pay warrant distribution. Compile, summarize, and input updated information into payroll excel spreadsheets. On occasion, act as the liaison between employees and the Division of Accounting. |
| 10% | E | Process requisitions in Advantage for retirement gifts/certificates and 25-year service awards. Analyze and audit the purchase document, ensuring accuracy of the Purchase Order, submit complete document package, process Receiver Record for payment, and ensure items purchased |

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are received and distributed to employee. Order benefit, payroll, miscellaneous forms, and personnel office supplies directly from the warehouse or supply distributor and maintain an adequate in-house supply.

- 5% E Volunteer Coordinator: Assist with hiring and separating volunteer workers; report and track volunteer hours on a monthly basis.
- 5% E Employee Recognition Coordinator: Track service credits and anniversary dates for local annual service recognition luncheons, order gifts/certificates for employees when appropriate.
- 5% M Serve as backup for clerical roles (Reception, Auto Pool, Mailroom, and Cashiering) in Administration Division. Duties include, but are not limited to: answering phones, assisting customers at reception desk, assign auto pool cars, operate mailroom equipment, pickup and distribute mail, sort and distribute payroll warrants, and receive and write receipts for over-the-counter cash and checks.
- 5% M Provide support at the District level to the Examination Unit by serving as an Assistant Proctor on the administration of local exams. Responsibilities may include, but are not limited to, the security of a variety of confidential examination-related materials, distribution and posting exam bulletins and riders throughout the district and field offices as directed; assist management in the collection of exam planning information; and respond to general exam questions.

ESSENTIAL 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.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

This position does not supervise other employees.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of basic grammar, spelling, and punctuation is necessary to communicate effectively both orally and in writing; basic math principles; various personnel management; benefits; privacy act; must have good organization skills and professional telephone expertise. Ability to maintain confidentiality, interpret benefit forms and determine if employee has provided complete information; write effectively and edit written material; follow oral and written instructions; present clear and concise facts during oral presentations; and prepare thorough written correspondence and reports. Demonstrate a positive attitude and a commitment to conduct business in a professional manner in dealing with the public and department clients; and provide quality customer service to all customers.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Poor information and/or decisions could result in the loss or delay of employee pay and benefits and could cause a hardship to new and existing employees, and possibly preclude the employee from use of health and dental benefits in the event of an emergency. An erroneous decision made in the exam process could result in compromising the integrity of the exam. Misuse of confidential information could result in employee hardship and/or legal ramifications for the Department.

PUBLIC AND INTERNAL CONTACTS

The incumbent will have contact with headquarters, district staff, and field staff on a daily basis. The incumbent must be able to deal effectively, courteously, professionally, and tactfully with the public, headquarters staff, and all staff throughout District 1. The incumbent will confer with employees, supervisors, and managers on sensitive and confidential matters. The incumbent may represent the department in public situations and at all times will be required to present themselves in a courteous, professional manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Mental requirements include sustained mental activity needed for reports and multi-tasking. The incumbent may be required to sit for long periods of time using a keyboard and video display terminal; must be able to develop and maintain cooperative working relationships, recognize emotionally charged issues, problems, or difficult situations and respond

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appropriately, tactfully, and professionally; must be able to deal effectively with difficult and sometimes angry individuals while maintaining a calm and professional demeanor.

WORK ENVIRONMENT

The incumbent will work in temperate-controlled office environment under artificial lighting. The incumbent will also work within a confined space such as a cubical or workstation utilizing modular furniture. Occasional travel, overtime or after-hours work may be required.

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.

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE