**Duty Statement**

Department of Human Resources

State of California

[ ]  Current [x]  Proposed

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| **Classification Title**Staff Services Analyst | **Division/Unit**Savings Plus/ Fiscal, Investments, Regulations, Projects, and Operations Branch |
| **Working Title**Operations Analyst | **IT Domain (if applicable)**  |
| **Position Number**363-736-5157-XXX | **Effective Date**   |
| **Name**   | **Date Prepared**10/20/2021 |

## CalHR Mission and Vision

The California Department of Human Resources (CalHR) is responsible for all issues related to employee salaries and benefits, job classifications, civil rights, training, exams, recruitment and retention. For most employees, many of these matters are determined through the collective bargaining process managed by CalHR.

**Our Vision:** To be the premier leader and trusted partner in innovative human resources management.

**Our Mission:** To provide exceptional human resources leadership and services with integrity, respect and accountability to state departments and all current and prospective employees.

## General Statement

Under the general supervision of the Personnel Program Advisor (PPA), the Staff Services Analyst (SSA) assists staff in performing a variety of functions related to Operations, Special Projects, and Regulations. The SSA assists in the development, design, testing, planning, and implementation of projects. The SSA analyzes facts, and develops project plans; reasons logically and creatively; and utilizes a variety of analytical techniques to resolve technical problems. The incumbent communicates clearly with others, both internally and externally; analyzes data and presents ideas and information effectively; manages multiple tasks in a fast-paced environment; has knowledge of project and risk management, and possesses a high degree of initiative and good judgement in conducting work assignments. The duties include, but are not limited to the following:

## Job Functions

[Essential (E) / Marginal (M) Functions]:

### 45% Perform Account Research (E)

* Perform research related to issues with deceased and beneficiary accounts, Required Minimum Distributions (RMD), and over deferral processing in order to ensure accuracy.
* Perform research in matters concerning individual participants and specific participant populations using the State Controller’s Office (SCO), MyCalPERS, and the Third-Party Administrator (TPA) recordkeeping and imaging systems.
* Gather information to complete analysis related to participant escalations or participant population remediation, provide recommendation on alternatives to management, and implement corrective action as necessary.
* Coordinate between Savings Plus staff and external business partners the annual processes including: reports from SCO; reports from TPA, such as participant population reviews, participant communications for RMD, over deferral warning notifications, and escheatment of unclaimed deceased accounts.
* Use systematical methods to interpret laws, rules, policies and procedures to develop recommendations to management to resolve participant escalations and inquiries.
* Serve as the facilitator in conducting Policy and Procedure Manual reviews with Savings Plus and the TPA staff.

### 25% Special Projects (E)

### Perform research and analysis to assist in the development of program or project activities, including program compliance and eligibility, regulatory issues, and funding requirements.

* Assist with the, planning, execution, and finalization of projects delegated from management with varying scale and scope in collaboration with internal and external experts and business partners.
* Collaborate with the TPA, other state departments, and internal and external staff to initiate new processes, resolve problems, gather information, and/or promote organizational goals and objectives.
* Research data from TPA and provide recommendations to management for consideration.
* Create and maintain work plans to track progress on project assignments. Prepare and present project status reports to management and other stakeholders.
* Deliver clear and concise messaging on system enhancements and system changes to management and staff.
* Review and monitor implementation of project specifications and/or requirements.
* Coordinate project communications with management oversite. Assist in the development of notification letters/emails, Frequently Asked Questions (FAQs), and online help content.
* Assist with design workflows and procedures on assignments.

### 15% Program Analysis and Monitoring of Legislation and Regulations (E)

### Assist in developing new regulations and the amendment of existing regulations to support the administration of the Program.

### Conduct bill analysis of proposed bills to submit to the CalHR Legislative Office.

* Work with the CalHR Legislative Office, external counsel, and/or TPA Legal to analyze, track, monitor, and implement federal and state legislation having an impact to the Program.
* Responsible for coordinating the annual review of the Fiduciary Checklist for completion of mandated fiduciary responsibilities and obligations and to ensure compliance with federal tax laws and that the Program maintain its favorable tax status under those laws.
* Manage the implementation of federal and/or state regulatory updates, and impact on processes, systems, and participant communications.
* Work with internal and external legal counsel, as well as Office of Administrative Law to develop clear and concise regulations. Ensure adherence to the rulemaking procedures under the California Administrative Procedure Act.
* Coordinate with internal and external partners on revisions to communication materials resulting from regulatory changes (i.e. - publications, forms, presentations, and website).
* Ensure all system and regulatory changes are captured in the Plan Documents governing the Program and alert staff to potential compliance concerns.

### 10% Branch Support (E)

### Respond to and track selected industry surveys to determine what other similar plans are doing, to be aware of industry trends, and to ensure Savings Plus is following industry best practices.

* Research and respond to Public Records Act requests.
* Develop and maintain desk procedures.
* Attend and administer training as deemed appropriate.
* Purge files, photocopy, file, review, and verify participant documents.

**5% Provide backup for Savings Plus Administrative Support duties (M)**

* Receive, open, and distribute incoming mail and overnight packages to appropriate staff. Assemble outbound overnight packages to TPA daily and to other parties as requested. Check for faxes and distribute to the appropriate staff.
* Maintain, audit, and reconcile leave balances and timesheets. Responsible for preparation of monthly summary reports and distribution of monthly leave balances to division supervisors.

## Supervision Received

The SSA reports directly to and receives the majority of assignments from the PPA and takes direction from the Personnel Program Manager II who oversees the Fiscal, Investments, Regulations, Projects, and Operations Branch.

## Supervision Exercised

None.

## Special Requirements / Desirable Qualifications

The duties of this position are performed indoors. The employee’s workstation is located at 1515 “S” Street building and is equipped with standard or ergonomic office equipment, as appropriate. Travel may be required to attend meetings or training classes.

Ability to gather and interpret information, think analytically and make effective decisions; possess a high degree of initiative and good judgement; reason logically, creatively, and utilize a variety of analytical techniques to resolve technical problems. Ability to use a computer, Microsoft Office Suite including: email, word processing, spreadsheets, and database.

## Working Conditions

None.

## Attendance

Must maintain regular and acceptable attendance at such level as is determined at the Department’s sole discretion. Must be regularly available and willing to work the hours the Department determines are necessary or desirable to meet its business needs.

**I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation.\*** (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Personnel analyst.)

*\*A Reasonable accommodation is any modification or adjustment made to a job, work environment, or employment practice or process that enables an individual with a disability or medical condition to perform the essential functions of his or her job or to enjoy an equal employment opportunity.*

Duties of this position are subject to change and may be revised as needed or required.

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| **Employee Signature** | **Employee Printed Name** | **Date** |

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

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| **Supervisor Signature** | **Supervisor Printed Name** | **Date** |