STATE OF CALIFORNIA – DEPARTMENT OF FINANCIAL PROTECTION AND INNOVATION

POSITION DUTY STATEMENT

DFPI-HRO 203 (Rev. 08-21)

NAME	EFFECTIVE DATE
CLASSIFICATION TITLE Personnel Specialist	**POSITION NUMBER** 410-111-1303-102
WORKING TITLE Transactions Specialist	**DIVISION/OFFICE/UNIT/SECTION** Administration/Human Resources Office/Personnel Selection and Services/Transactions-Exams
BARGAINING UNIT R01	**GEOGRAPHIC LOCATION** Sacramento

General Statement: Under general supervision of the Staff Services Manager I (SSM I), the Personnel Specialist performs a full range of increasingly complex transactions duties in a variety of payroll and benefit service areas for the Department of Financial Protection and Innovation (DFPI) in the Human Resources Office Transactions Unit within the Division of Administrative Services. Duties include, but are not limited to:

A. Specific Assignments [Essential (E) / Marginal (M) Functions]:

45% (E) Prepares, processes, and maintains documents, reports or records involving personnel and payroll transactions. Duties include but are not limited to: Applies State laws, departmental, and control agency rules and regulations; and bargaining unit provisions pertaining to a variety of personnel transactions. Responsibilities include: Keys various types of employee information, leave data and payroll actions into the appropriate automated data bases; MyCalPERS, SCO (HIST, PIP, PIMS, CLAS). Processes PARS, relating to appointment and transfer transactions. Processes Employee Action Request (EAR) forms and updates employee records to maintain accurate address and tax withholding information. Handles separation transactions relating to resignations, retirements, and stipulations. Processes separation EARS, along with separation documents. Prepares Form 612 and OPFs for transfer of employees to other departments/reporting units; reviews employment and pay history to ensure the information is correct prior to sending file; purges and arranges material in OPF in accordance with established guidelines. Provides verbal and written A01 employment verification for other Departments. Completes and tracks documents to process pay, such as overtime, out of class, other relevant misc. pay, and adjustments. Research and resolves pay issues. Works closely with Fiscal Services on accounts receivables, salary advances, garnishments; and all requests for lost or destroyed warrants. Prepares notifications for Probationary Reports, Individual Performance Reports, Benefit Over Max Reports, and disseminates copies to clients.

25% (E) Prepares and distributes information on open enrollment, health and dental benefits, FlexElect and long-term disability insurance and other employee benefits. Determines benefit eligibility requirements and rules which apply to various contracts; processes forms for health, dental, vision, life insurance, Long Term Disability, Group Legal Plan, FlexElect, COBRA, Catastrophic Leave, direct deposit, annual leave, and explains benefit information to employees. Updates and maintains relevant payroll and benefit information on the DFPI intranet. Provides Back-up support to the Disability Coordinator for FMLA, SDI, NDI and Leave of Absence information and processing.

15% (E) Reviews attendance reports; audits leave usage; researches and resolves discrepancies; makes corrections to CLAS database to ensure accuracy. Verifies employees' annual leave statements. Reconciles and certifies monthly payroll. Reviews PAR and payroll documents to ensure accuracy. Tracks range change eligibility, special pay differentials, PERS eligibility, and probation report due dates; and prepares appropriate documents. Prepare, edit, and run MIRS and View Direct reports.

10% (E) Maintains various manuals, PAM, PPM, BAM, DPA pay scales, and employee OPFs to ensure information is up to date. Reads, research, and revises memos and procedures; and applies the information accordingly. Works with Attendance Coordinators to effectively coordinate information and documentation on new and separating employees and sends Leave Accounting (LAB) reports to the attendance coordinators and management. Communicates information verbally and in writing to employees, supervisors, control agencies, other departments, and the general public with tact and diplomacy. Uses e-mail for gathering and dispersing information. Attends training classes for personal and professional development. Participates in information sharing meetings. Conducts employment verifications as requested by entities outside state service. Serves as one of the primary contacts for employees at the Human Resources counter.

5% (M) Performs administrative duties including, but not limited to adheres to Department policies, rules and procedures; submits administrative requests including leave, overtime (if applicable), travel, and training in a timely and appropriate manner; accurately reports time in the Daily Log system; and submits timesheets by the due date.

B. Supervision Received

The Personnel Specialist receives general supervision from the Transactions/Exams/Recruitment Manager, (SSM I Supervisory); however, direction and assignments may also come from the Personnel Services Manager (SSM II Supervisory).

C. Supervision Exercised

None

D. Administrative Responsibility

None

E. Personal Contacts

The Personnel Specialist has daily contact with all levels of Department personnel, as well as representatives from other State agencies, including control agencies and the general public.

F. Actions and Consequences

The actions of the incumbent have a direct bearing on the success, integrity and legality of the Department's Human Resources management and Transactions/Examination programs.

G. Functional Requirements

Working in the Natomas area commercial building.

Frequently:

- Sitting at a desk, in a chair, and in front of a computer screen.
- Moving/walking about the office and standing or sitting during in meetings.
- Using a telephone or a cordless telephone with headset.
- Bend (neck and waist), squat, kneel, and twist (neck and waist).
- Perform repetitive hand motion, simple grasping, fine manipulation, pushing and pulling with right and left hands.

Occasionally:

- Reaching (above and below shoulder level).
- Traveling via private or public transportation (i.e., driving automobile, airplane, etc.) including overnight travel inside California may be required.
- Lifting and carrying up to 20 pounds.

H. Other Information

Knowledge of: Current office methods, procedures, equipment, and basic math principles.

Ability to: Think logically, multitask, and apply laws, rules, regulations, and bargaining contract provisions concerning personnel transactions; independently interpret and use reference material; give and follow directions; gather data; design and prepare tables, spreadsheets, and charts; advise employees of their rights; consult with supervisors on alternative actions which they may take on various transaction situations; communicate effectively; operate a computer keyboard/terminal; establish and maintain cooperative working relations with those contacted during the course of the work; organize and prioritize work; create/draft correspondence; maintain personnel records.

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 Health & Safety analyst.)

_____
Employee Signature Date

_____
Employee's Printed Name, Classification

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

_____
Supervisor Signature Date

_____
Supervisor's Printed Name, Classification