

**Department of Health Care Access and
Information Duty Statement
Proposed**

Employee Name Vacant	Organization Department of Health Care Access and Information Human Resources Services (Transactions Unit)	
Position Number 441-164-1317-XXX	Location Sacramento	Telework Option Hybrid
Classification Senior Personnel Specialist	Working Title Lead Personnel Specialist/Retirement Specialist	

General Description

Under the general supervision of the Staff Services Manager I (SSM I), the Senior Personnel Specialist (Retirement and Benefits Specialist) performs the most complex and sensitive personnel transactions and benefit-related work. The incumbent acts as the department's Retirement and Benefits subject matter expert, provides lead direction to Personnel Specialists, manages a small assigned roster, and ensures compliance with CalHR, CalPERS, and SCO rules and regulations. This position also serves as the secondary FMLA/Disability Coordinator and backup for Position Control, and performs other duties in support of Human Resources operations.

Supervision Received	Will report to the Transaction Supervisor (Staff Services Manager I)
Supervision Exercised	Will supervise/lead Personnel Specialists
Physical Demands	Must possess and maintain sufficient strength, agility, endurance, and sensory ability to perform the duties contained in this duty statement with or without reasonable accomodation.
Typical Working Conditions	Requires prolonged sitting, use of computer, telephone, and frequent contact with employees/internal customers.

Job Duties

E = Essential, M = Marginal

40%	E	Retirement and Benefits Specialist: Serve as the department's Retirement and Benefits Specialist, acting as a subject matter expert on CalPERS retirement and lead/coordinate special and open enrollment cycle for health, dental, vision, and other related benefits offerings. Process and audit retirement-related PARs and benefit documents to ensure compliance with CalHR, CalPERS, and SCO requirements. Advise employees and management on retirement options, service credit, disability retirement, survivor benefits, and post-retirement changes. Respond to inquiries and provide one-on-one retirement and benefit consultations.
30%	E	Transactions Lead: Provide lead direction and mentorship to Personnel Specialists; monitor work assignments, provide technical guidance, and ensure accuracy and consistency in transaction processing. Utilizes the Management Information Retrieval System (MIRS) to extract, analyze, and compile personnel data for reporting, auditing, and decision-making purposes. Support the SSM I by identifying training needs, assisting with procedures, and leading cross-training initiatives. Serve as acting lead during the manager's absence to ensure continued

operations. Monitor transaction deadlines and provide technical assistance and quality control reviews for other Personnel Specialists.

15% E **Roster Ownership:** Independently process complex and routine personnel actions (appointments, transfers, separations, pay changes, timesheets, etc.) for small roster of employees (OAS/OHFLI).

10% M **Alternate (Backup) FMLA/Disability Coordination and Position Control:** Serve as the secondary coordinator for employee leave programs, including FMLA, CFRA, PDL, and all disability claims. Review medical documentation, calculate eligibility, and assist employees and supervisors with leave options and requirements. Maintain confidential medical documentation in compliance with federal and state regulations. Provide backup support for Position Control duties: assist with position tracking, allocation requests, org chart updates, and verifying the Position Control Roster in coordination with HR and Budget.

5% M **General Duties and Special Projects:** Perform other duties as required to support Human Resources operations, including participation in audits, special assignments, process improvement initiatives, and policy updates. Stay current on applicable HR laws, bargaining unit contracts, and state policies.

Other Expectations

- Demonstrate a commitment to building an inclusive work environment that promotes HCAI's diversity, equity and belonging where employees are appreciated and comfortable as their authentic selves.
- Demonstrate a commitment to maintaining a work environment free from workplace violence, discrimination, and sexual harassment.
- Demonstrate a commitment to HCAI's Mission, Vision, and Goals.
- Demonstrate a commitment to HCAI's Core Values and Guiding Principles.
- Maintain good work habits and adhere to all HCAI policies and procedures.

To Be Signed by the Employee and Immediate Supervisor

I have read and understand the duties and expectations of this position

I have discussed the duties and expectations of this position with the employee.

Employee Signature/Date

Supervisor Signature/Date