



Duty Statement

Classification: **Associate Governmental Program Analyst**

Position Number: **275-190-5393-063**

HCM#: **3132** **JC-497226**

Branch/Section: **Customer Services and Support Branch/Customer Experience**
Division/Customer Support II Section – Member Team 8

Location: **Sacramento, CA**

Working Title: **Customer Contact Center Associate**

Effective Date: **September 1, 2024**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: ☐ **Yes** ☒ **No**

Telework: ☐ **Office-Centered** ☒ **Remote-Centered** ☐ **Not Eligible**

The CalPERS Customer Contact Center is the first point of contact for CalPERS customers, providing customer services and education by phone and correspondence concerning retirement and health benefits, applying the Public Employees' Retirement Law (PERL), Public Employees' Medical and Hospital Care Act (PEMHCA), applicable regulations, new legislation, and policy initiatives.

Under the direction of the Staff Services Manager I (SSM I), and working with Division Management, the Associate Governmental Program Analyst (AGPA) independently performs the more responsible, varied, and complex technical analytical duties to support the customer service goals and objectives of the Customer Experience Division (CXD) and CalPERS and applies PERL and PEMHCA provisions to provide assistance to active and retired members, employers, beneficiaries, and the general public.

Essential Functions

Remote-centered team members will be required to come into Sacramento Headquarters or their assigned Regional Office location on a routine, regular basis for instances including, but not limited to, attending CalPERS business-related meetings, picking-up and/or dropping-off of office equipment or work materials/product, attending training, and obtaining general office supplies or when your specific position requires work to be performed onsite.

45% Onsite¹ and virtually, work in a Contact Center environment, as part of the Internal Agent Assistance (IAA) Team, act as a Subject Matter Expert (SME) through the Call Escalation processes, by providing analytical assistance, training, and guidance to less experienced agents over the telephone, in the resolution of customer issues that require time sensitive and complex analysis and expertise in specific program areas. Upon receipt of escalated calls, provide guidance or direction to the initial telephone agent, or intervene on the call and speaks directly with the customer to resolve the inquiry. In response to all inquiries, provide assistance in analysis, interpretation of the PERL and PEMHCA, and the execution of

CalPERS statutes, laws, rules, regulations, policies, and procedures. Respond to inquiries that cannot be completed at the initial point of contact and require complex research and analysis, and time-sensitive inquiries/complaints concerning retirement and health issues across all CalPERS business areas. Resolve the more responsible and complex problems/issues that exceed the specified time frames. Determine when issues need to be referred to an appropriate division for a more thorough response and makes referrals on a timely basis. Responsible for the documentation of all statements and/or actions to the customer's account in a clear and concise manner in the myCalPERS system, in accordance with the Division's Quality Assurance guidelines. Demonstrate the ability to type at a speed and proficiency to meet performance expectations.

- 30% Onsite and virtually, Work in a Contact Center environment, act as an initial point of contact, provide professional assistance and information to customers (including active and retired members, employers, beneficiaries, and the general public) regarding CalPERS retirement benefits and health programs via telephone. In response to inquiries at all levels of complexity, provide assistance in analysis, interpretation, and the execution of CalPERS statutes, laws, rules, regulations, policies, and procedures. Provide all customers with comprehensive information and assistance in navigation and creation of accounts within the myCalPERS system, on all services provided by CalPERS, including but not limited to: the completion of health and retirement transactions of the more responsible complex and sensitive nature, purchase of service credit, death benefits, retirement allowance options, community property, payroll issues, membership questions, employer contracts, etc.; provide information on health and dental enrollment and eligibility, clearly explain membership eligibility criteria, adjustment processes, and contract and payroll requirements, as needed. Ensure that all assignments are completed within agreed upon service level expectations while adhering to the CXD Quality Assurance guidelines.
- 10% Onsite and virtually, through the Secure Messaging portal of the myCalPERS system, workflow processes, fax, TTY machine, and letters, respond to customer inquiries by written correspondence utilizing division approved templates when required. Responsible for maintaining high-level communication with customers on the most sensitive issues forwarded from CXD management, and/or division units, requiring immediate attention and/or resolution.
- 10% Onsite and virtually, identify call trends, training, and coaching opportunities revealed or detected through the call escalation process. Present these trends and recommendations to management for further review.
- 5% Onsite and virtually, as a Subject Matter Expert (SME), work independently or with others, as assigned, to draft and/or review policies, procedures, and external communications in support of new legislation, changes in processes, policies, laws, rules, and regulations as they apply to CalPERS Customer Contact Center business operations. Collect and analyze data related to operations, participate on project teams, make recommendations to team leaders via email, or during team meetings for procedural changes to streamline processes, and improve customer service while acting as a specialist on issues related to the CXD Customer Contact Center. Perform other related duties as assigned.

Working Conditions

- ¹This position is designated as remote-centered and works primarily at their designated alternate work location.
- Continuous interactions with customers via the telephone

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance).
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

Employee Name (Print):

Employee Signature:_____ **Date:**

I certify that the above accurately represent the duties of the position.

Supervisor Signature:_____ **Date:**



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Classification: **Associate Governmental Program Analyst**

Position Number: **275-190-5393-031**

HCM#: **1050 JC-497226**

Branch/Section: **Customer Services and Support Branch/Customer Experience
Division/Customer Support II Section – Member Team 3**

Location: **Sacramento, CA**

Working Title: **Customer Contact Center Associate**

Effective Date: **August 12, 2024**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: ☐ Yes ☒ No

Telework: ☐ Office-Centered ☒ Remote-Centered ☐ Not Eligible

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