

Current  
 Proposed

Civil Service Classification: Personnel Specialist  
Working Title: Transactions Specialist  
Division Branch Name: Division of Administrative Services  
Incumbent: Vacant  
Position Number: 797-632-1303-002  
Effective Date:  
Conflict of Interest (COI): N  
FLSA Status: Non-Exempt  
CBID: R01  
Tenure: Permanent  
Time Base: Full-time

You are a valued member of the department's team. All CDA employees are expected to work collaboratively with internal and external stakeholders to enable the department to provide the highest level of service possible. Your efforts to treat others fairly, honestly, and with respect are important to everyone who works with you. We value diversity at CDA and we strive to achieve equity and inclusion in the workplace for all employees. We believe that a diverse workforce and inclusive workplace culture enhances the performance of our organization and the quality of representation that we provide to a diverse client base.

Primary Domain(s): N/A

## **DESCRIPTION:**

Under the close supervision of the Personnel Supervisor II within the Human Resources Bureau, the incumbent is responsible for independently performing the full range of personnel and payroll transactions for the California Department of Aging (CDA). The incumbent processes employee benefits, conducts new hire onboarding, and prepares salary determinations and Requests for Personnel Action for all appointment types. The incumbent also researches and resolves issues related to pay, leave, and benefits; reconciles and audits personnel and payroll documents for accuracy and compliance; and maintains Official Personnel Files in accordance with state and departmental requirements, and processes time sheets. Incumbent must be able to manage and prioritize their work to meet deadlines and maintain confidentiality and ensure compliance with applicable privacy and employment laws when handling all employee information.

## ESSENTIAL JOB FUNCTIONS:

**35%** Responsible to prepare new hire emails, meet with new hires to complete onboarding which includes, obtaining various required forms, and explaining and providing various benefit options and leave type options. Determine appropriate salary and transactions codes, and keys into the State Controller's Office (SCO) system appropriately. Utilize various personnel and payroll resources to ensure timely and correct processing of pay and benefit documents, including, the Personnel Action Manual (PAM) and the Payroll Procedures Manual (PPM), and Personnel and Pay Letters.

Responsible for processing separations and retirements, which includes documenting and preparing various documents to ensure correct lump sum projections and ensure final pay is processed timely and accurately based on the separation type.

Processes miscellaneous changes to employment history to ensure timely and accurate updates and leave accounting records in the appropriate automated database systems. Creates and maintains tickler files for future transactions, as well as employee eligibility and reports such as, upcoming appointments and separations, alternate range changes, merit salary increases, and other critical matters.

Responsible for receiving, reviewing, and responding to requests for employment verifications from various sources (e.g. employees, Employment Development Department, lenders, employers, etc.). Ensure all verification requests include a valid, signed authorization release, and provide accurate employment information. Provide verification responses via appropriate methods, including email, fax, or mail, based on requester's preference.

**25%** Administers payroll processes to ensure timely payment of wages. Review and verify employee timesheets submissions and ensure employees are paid accurately. Reconciles and certifies monthly payroll. Maintains and files warrant registers and STD. 672 Time and Attendance Reports. Utilize the California Department of Human Resources (CalHR) pay scales and salary rules to calculate and determine appropriate salary rates for new hires, transfers, promotions, and other personnel actions. Apply salary determination rules including alternate range criteria, special salary adjustments, movement within salary ranges, and application of civil service rules. Coordinate with Classification and pay analysts as needed to process salary determinations.

Prepares salary advance requests utilizing SCO paycheck calculator to accurately determine appropriate salary amounts based on employee classification, time worked, deductions, and applicable pay differentials. Ensure all calculations and documentation comply with payroll policies. Submit salary advance documentation to accounting for timely processing within required timely payment of wages. Clear salary advances timely.

Receive and examine court orders and wage garnishment notices. Send out memorandums utilizing agency letters for required action. Document the required forms for State Controller's Office to upload to Connect HR who then processes wage garnishment and court-ordered payroll deductions. File and retain all related documents including garnishment orders, correspondence, and warrant releases. Track ongoing deductions and ensure they are correctly applied until satisfied.

**25%** Processes new hire, open enrollment, and retiree benefit documents for health, dental and vision, and other benefits, by reviewing for accuracy and submitting to correct entity. Prepares benefit packages for employees and responds to employee benefit questions. Maintains current and tickler files the various benefits. Reviews, audits, monitors, and tracks employee benefit documents to ensure applicable changes/updates are completed. Serves as the California Public Employees Retirement System (CalPERS) Coordinator. Inputs updated employee health benefit information into the CalPERS system. Update CalPERS for dependent reverifications and review and process required forms. Update Family Connect for Dental and Vision dependent reverifications. Process Consolidated Omnibus Budget Reconciliation Act (COBRA) notices to employees and dependents following qualifying events such as enrollment into benefits, separations and 26-year-old deletes. Maintain accurate records of COBRA notifications, elections, and coverage periods.

**10%** Processes all monthly attendance, which includes keying employees' leave usage into SCO's California Leave Accounting System (CLAS). Verify time sheets with timekeepers on staff time reporting to ensure accurate and timely data is entered into the SCO's CLAS to reconcile monthly attendance for all employees, including the prior input to the CLAS. Resolves time and attendance discrepancies via CLAS error messages. Attends mandatory training virtually or in-person to maintain knowledge of various laws, rules, regulations, best practices, and compliance.

#### **MARGINAL FUNCTIONS:**

**5%** Performs other job-related duties and special projects assigned including, answering telephones and aids callers, office visitors, and other designated Department Bureaus. Retrieves and processes mail timely. Prepare materials for and conducts Timekeeper Meetings. Actively participates in planning and organizing team activities.

#### **TRAVEL:** N/A

#### **TYPICAL WORKING CONDITIONS:**

The physical work location of the position is designated at the department's headquarters location, a three-story building and standard office modular workspace located in Natomas. The duties of the position require sitting for long periods of time while using a personal computer, reviewing documents, and attending meetings whether they are digital (i.e., Zoom, WebEx, MS Teams, etc.) or in person.

## **EQUAL EMPLOYMENT OPPORTUNITY:**

The California Department of Aging is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.

It is the policy of CDA to provide equal employment opportunity to all employees and applicants; those employees have the right to work in an environment free from discrimination; those consumers have the right to receive services free from discrimination in compliance with local, state, and federal laws.

## **To be reviewed and signed by the supervisor and employee:**

### **SUPERVISOR'S STATEMENT:**

- I have discussed the duties and responsibilities of the position with the employee.
- I have signed and received a copy of the duty statement.

---

Supervisor's Signature and Date

---

Supervisor's Name and Title

### **EMPLOYEE'S STATEMENT:**

- I have discussed the duties and responsibilities of the position with my supervisor.
- I have signed and received a copy of the duty statement.
- I am able to perform the essential functions listed with or without reasonable accommodation (if you believe reasonable accommodation is necessary, discuss your concerns with your supervisor. If unsure of a need for reasonable accommodation, inform your supervisor who will discuss your concerns with Human Resources.)
- I understand that I may be asked to perform other duties as assigned within my current classification, including work in other functional areas as business needs require.

---

Employee's Signature and Date

---

### **HUMAN RESOURCES BRANCH USE ONLY:**

Duties meet class specification and allocation guidelines.

Exceptional allocation, STD 625 on file.

STATE OF CALIFORNIA  
CALIFORNIA DEPARTMENT OF AGING  
**DUTY STATEMENT**  
CDA 9003 (REV 06/2024)

Analyst initials: KG Date Approved: 01/08/2026

Revision Date (if applicable): \_\_\_\_\_

