



Duty Statement

Classification: **Analyst I**

Position Number: **275-190-5157-910**

HCM#: **9371 JC-506837**

Branch/Section: **Customer Services & Support Branch/Customer Experience Division/ CalPERS Contact Center - Frontline Agent Readiness & Mentorship (FARM) Team 1**

Location: **Sacramento, CA**

Working Title: **Contact Center Analyst**

Effective Date: **January 1, 2026**

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

Supervision Exercised: **Yes** **No**

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

The CalPERS 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 supervision of a Supervisor I, the Analyst I serves as a frontline resource for CalPERS members, employers, and the public. The Analyst I responds to customer inquiries, interpreting and applying laws, regulations, and policies to resolve issues and provide accurate information about benefits and procedures. Duties include, but are not limited to:

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, provide customers with information and assistance via telephone on a variety of topics and services provided by CalPERS, including but not limited to: the completion of health, dental, and retirement transactions, purchase of service credit, death benefits, retirement allowance options, community property, payroll issues, membership questions, and employer contracts. Provide information on requirements for health and dental enrollments, explain membership eligibility criteria, adjustment processes, and contract and payroll requirements, as needed. Assist customers with establishing, accessing, and/or navigating their account in myCalPERS. Ensure that all inquiries are responded to within agreed upon service level expectations in a professional and courteous manner while adhering to CXD policies, procedures, expectations, and key performance indicators. Utilize

myCalPERS and all related CalPERS Contact Center systems to deliver accurate and timely information to both customers and unit leaders. Ensure that all interactions, including call outcomes and actions taken on customer accounts, are thoroughly and accurately documented within the appropriate systems. Perform all aspects of customer assistance, data entry, and documentation in strict compliance with established performance standards and the Division's Quality Assurance guidelines, typing at a speed and level of accuracy that consistently meets or exceeds these standards to support efficient, high-quality service delivery.

- 35% Onsite and virtually, respond to phone calls from customers (active and retired members, employers, beneficiaries, and the general public) and provide information regarding CalPERS retirement and health programs. Review and research the PERL, PEMHCA, applicable regulations, legislation, and all Division or Enterprise policies and procedures to interpret and apply requirements when responding to customer inquiries. Determine when issues need to be referred to an appropriate division for a more thorough response and make referrals on a timely basis and in accordance with division procedures.
- 10% Onsite and virtually, stay apprised of changes or updates to Division or Enterprise policies or procedures by performing a daily review of Contact Center News Network for changes to processes, procedures, or upcoming system changes. Attend meetings and trainings as assigned.
- 10% Onsite and virtually, collect and analyze data related to operations, participate on project teams, and make recommendations for procedural changes to streamline processes and improve customer service on issues related to the CalPERS Contact Center. Perform other duties as assigned that are appropriate for the classification.

Knowledge, Skills and Abilities

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; governmental functions and organization.

Skill in:

- Organization and time management
- Professional call center or other customer service industry background
- Detail orientation
- Basic computer skills and software application use
- Implementing management direction and conclusions
- Exceptional customer service and social skills
- Applying and interpreting PERL and PEMHCA rules and regulations, departmental policies and procedures, and related statutes, laws, rules, regulations.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work.

Working Conditions

- ¹ This position is designated as remote-centered and works primarily at their designated alternate work location.
- Continuous interactions with customers on the phone, often addressing situations of intense pressure.
- Use of a computer mouse and intermittent keyboarding to accomplish certain tasks within specified timeframes is required.
- Being stationary, being upright, and phone requirements consistent with Contact Center work.
- Wired headsets to allow for mobility while working.
- Expected to accomplish tasks within strict timeframes to meet Key Performance Indicators.
- Office setting with artificial light and temperature control (applicable only if working onsite).

Conduct, Attendance, and Performance Expectations

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

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 represents the duties of the position.

Supervisor Signature: _____ **Date:**