



# Duty Statement

Classification: **Office Technician (General)**

Position Number: **275-440-1138-011**

HCM#: **2571**

Branch/Section: **Disability & Survivor Benefits Division / Survivor Benefits Section / Post Retirement Survivor Benefit**

Location: **Sacramento, CA**

Working Title: **Post Retirement Survivor Benefits Technician**

Effective Date: **June 16, 2026**

Collective Bargaining Identifier (CBID): **R04**

Supervision Exercised:  Yes  No

Telework:  Office-Centered  Remote-Centered  Not Eligible

The Disability & Survivor Benefits Division (DSBD) provides benefits and information to members, retirees, beneficiaries, and survivors. The Post-Retirement Survivor Benefits Section is a high-volume production unit that pays post-retirement survivor benefits, and researches and resolves the most complex survivor benefit cases.

Under direction of the Supervisor I in the Post Retirement Survivor Benefit Processing Unit, the Office Technician performs the following duties and responsibilities:

## Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

40% Onsite<sup>1</sup> and virtually, monitor electronic incoming mail workflow for the Post-Retirement Survivor Benefits Unit. Utilize the internal myCalPERS system to conduct review of deceased member, beneficiary, and community property payee cases to determine status of case and distribute case workflow to designated processing queues based on established unit procedures.

Onsite and virtually, utilize internal OpenText program to fax and distribute reclamation letters to financial institutions for collection of overpayments. Review and upload incoming mail, faxes received through Microsoft Office shared mailbox, and documents received from the Financial Reporting & Accounting Services Division to members' account.

- 30% Onsite and virtually, monitor unclaimed benefits workflow task for the Post-Retirement Survivor Benefits units to identify cases requiring beneficiary research. Review deceased member, beneficiary, or community property payee participant record accounts in the internal myCalPERS system to identify eligible beneficiary(ies) or next of kin. Conduct research utilizing the internet and programs such as Accurint and Thomson Reuters CLEAR to identify and locate potential beneficiary(ies) and next of kin information. Review outstanding overpayment receivables and identify any joint bank account holders. Contact beneficiaries, survivors, and other third parties by phone or mail to request information and documentation.  
  
Onsite and virtually, input required information, documentation, and case notes into the internal myCalPERS system to validate that all steps to identify and contact eligible beneficiary(ies) and next of kin are completed, and route the case workflow to the appropriate workload queues and tasks for further processing.
- 15% Onsite and virtually, monitor workflow notification queues and move cases into designated workload queues for assignment and processing.
- 10% Onsite and virtually, review Consolidated Death Report for deaths reported by the Health Account Management Division to identify potential eligible survivor and refer to unit lead for processing.
- 5% Onsite and virtually, participate in regularly scheduled meetings and attend required trainings. Perform other duties as assigned and that are appropriate for this classification.

**Working Conditions**

- <sup>1</sup> This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Sitting, standing, lifting, pushing, and pulling requirements are consistent with office work.
- The incumbent works 40 hours per week in an office setting, with artificial lighting and temperature control.
- Daily access to and use of the telephone, personal computer, and computer programs/program databases.

**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:**