

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Personnel Specialist	OFFICE/BRANCH/SECTION Office of Transactions Services/Division of Human Resources	
WORKING TITLE Personnel Specialist	POSITION NUMBER 702-008-1303-xxx	REVISION DATE

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

**GENERAL STATEMENT:**

Under close supervision of the Personnel Supervisor or Branch Chief (Staff Services Manager I) at the entry level and general supervision at the journey and advanced levels, the Personnel Specialist (PS) applies state laws, departmental rules and regulations, and bargaining unit provisions pertaining to a variety of personnel transactions. The PS is responsible for processing appointments, separations, payroll, and benefits for California Department of Transportation (Caltrans) employees and related personnel transactions functions. All duties require effective communication and excellent customer service with internal staff, employees and control agencies.

**CORE COMPETENCIES:**

As a Personnel Specialist, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Cultivate Excellence - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence - Innovation)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Cultivate Excellence - Integrity)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Cultivate Excellence - Integrity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Pride)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Cultivate Excellence - Equity)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Cultivate Excellence - Integrity)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Cultivate Excellence - Pride)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	

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30%	E	Perform payroll related transactions such as salary determinations, appointments, payroll adjustment notices, overtime, special pay, shift differential, etc. Reconcile and certify monthly and semi-monthly master payroll using the State Controller's Office (SCO) Master Payroll Certification (MPC) input system to accurately compensate employees. Monitor SCO's Payroll Warrant Register daily to ensure warrants are properly issued and released to employees as well as captured and applied to any salary advances (SAs), accounts receivables (A/Rs) and travel expense claims. Calculate and prepare SAs to issue correct pay, and release warrants and SAs to ensure accurate and timely receipt by the employee. Research and resolve pay issues by establishing, collecting, monitoring and satisfying A/Rs and SAs including providing notification to employees. Prepare clear and concise memoranda/letters to employees and appropriate departmental staff to explain actions, request approvals, or request and/or provide information. Process and monitor wage garnishments, providing notice to employees and ensuring disposable income calculations and deductions are in accordance with established laws, rules and control agency direction. Maintain and file warrant registers; report exceptions to payroll and process; and compute final compensation and benefits for separating employees to ensure timely payment of wages according to LC201 and 202.
20%	E	Use SCO's Personnel Information Management System (PIMS) to update employment history of employees such as appointments, separations, retirements, and other miscellaneous changes. Provide information to employees on deferred compensation, voluntary personal leave program, alternate work schedules, the Staff Central program, and various benefits or insurance available to departmental employees.
15%	E	In accordance with the California Public Employee's Retirement System (CalPERS), California Department of Human Resources (CalHR), and State Personnel Board (SPB) regulations, process enrollments, changes and cancellations for benefits, such as health, dental, vision, FlexElect, direct deposit, long term disability, retirement, direct pay, Consolidated Omnibus Budget Reconciliation Act (COBRA), and other benefits and insurance. Update employee health benefit status in SCO's Affordable Care Act System (ACAS). Track intermittent hours to ensure timely benefit enrollment or cancellation. Determine and explain benefit eligibility requirements, costs and submission deadlines to employees.
10%	E	Interpret and maintain a working knowledge of laws, rules, regulations and bargaining unit contracts. Research, review, implement, and maintain various manuals, memos, pay letters, policies, and procedures in areas affecting personnel transactions, payroll, and record keeping. Respond to internal and external inquiries on changes in policy, procedures and employee benefits. Serve as advisor for policy and procedural changes.
10%	E	Maintain the California Leave Accounting System (CLAS) by researching, correcting and updating employee leave usage and earnings via monthly audit of timesheets. Audit state service, reconcile leave balance reports, and complete input and correction documents as needed to ensure each employee's leave record information is current and correct, using various SCO and internal reports. Maintain leave accounting and hours-worked records on part-time and intermittent employees and retired annuitants. Administer and calculate Non-Industrial Disability (NDI), Enhanced Non-Industrial Disability (ENDI), State Disability Insurance (SDI), and catastrophic leave donations for eligible employees.
10%	E	Attend training sessions as required. May serve as lead in the unit to assist or guide new and lesser experienced staff; and act as the backup to the supervisor in his/her absence.
5%	M	In accordance with state and departmental retention policies, maintain and file warrant registers, pay requests, attendance forms, and official personnel documents.

<sup>1</sup>ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

**SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS**

None

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Knowledge of:

- current office methods, procedures, and equipment to ensure the efficient operation of personnel/payroll services
- basic math principles as they relate to personnel/payroll matters (e.g. salary determination, accounts receivable, etc.)
- mathematical computations using addition, subtraction, multiplication, division, etc.
- communication principles (verbal & written) to provide information relating to various personnel/payroll functions

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- problem-solving techniques and processes for resolution of issues

### Able to:

- understand verbal and written instructions containing technical information
  - exercise sound judgment when making decisions
  - apply time management practices to prioritize, schedule and complete work effectively
  - work on multiple tasks or parts of tasks simultaneously
  - keep work area organized; research and/or apply laws, rules, regulations, and bargaining unit contracts concerning personnel transactions
  - utilize reference materials to ensure conformity, consistency, and compliance according to laws, rules, regulations, etc.
  - be flexible in adapting to changes in priorities, assignments, and other interruptions that may impact previously established assignments
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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for effectively planning, coordinating, and executing personnel transactions functions as they relate to the Office of Transactions Services. Poor judgment or incorrect reporting of information could significantly affect employees' pay and benefits and cause considerable hardship to all levels of employees. The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employee's confidential information may damage HR's reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

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### PUBLIC AND INTERNAL CONTACTS

The incumbent will work with all levels of Caltrans staff, management, consultants, private sector groups, and representatives of State control agencies. The incumbent must work with others in a cooperative manner.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent must have the ability to multi-task, adapt to changes in priorities, assist in the production of completed staff work, read and understand a variety of technical documents, and effectively deal with pressure while maintaining focus and remaining professional even under adversity. The incumbent must be customer service oriented due to the opportunity for interaction with staff at all levels within the organization. The ability to work with others in a positive and cooperative manner is extremely important. The incumbent will sit for long periods of time using a keyboard and monitor and may, on occasion, assist with movement of files, boxes, or other miscellaneous office supplies which will weigh up to 10 pounds.

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### WORK ENVIRONMENT

While at their base of operation, incumbent will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

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EMPLOYEE (Print)

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EMPLOYEE (Signature)

DATE

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE