

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Human Resources/Transaction Services	
WORKING TITLE Transactions & Operations Analyst	POSITION NUMBER 702-008-5393-924	REVISION DATE 07/15/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the general direction of the Supervisor I the incumbent provides administrative, training and analytical support for the Office of Transactions Services. The Analyst II demonstrates a positive attitude and a commitment to providing quality service that is accurate, timely, and exceeds our customers' expectations.

CORE COMPETENCIES:

As an Analyst II , 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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Employee Excellence - People First)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - People First)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Employee Excellence - People First)
- **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. (Employee Excellence - People First)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Employee Excellence - People First)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Employee Excellence - People First)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Employee Excellence - People First)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - People First)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Employee Excellence - People First)

TYPICAL DUTIES:

Percentage
Essential (E)/Marginal (M)¹ Job Description

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25%	E	Serve as the primary Training and Policy Coordinator for the Office of Transaction Services (OTS). Facilitate and deliver both classroom and virtual training for new and experienced staff, including onboarding, Basic Equipment Safety Training (BEST), training modules, advanced transaction training, and specialized learning sessions. Analyze statewide and program-specific training needs by reviewing error trends, SCO notices, CalPERS alerts, bargaining unit changes, audit findings, and workload patterns. Use this information to create annual and quarterly training plans that address gaps and upcoming requirements. Maintain all training records, sign-in sheets, and completion logs on the internal drive, Microsoft Teams, and other storage locations designated by leadership. Ensure compliance with mandated training deadlines; track delinquent completions and follow up with supervisors. Coordinate with SMEs, senior analysts, supervisors, and managers to gather technical content, process steps, and system guidance needed to build accurate and effective training. Adapt quickly to constant change, remain flexible, and collaborate well with a diverse group of individuals. Design and develop new or updated training modules, including learning objectives, facilitator guides, participant guides, job aids, visual aids, hands-on exercises, quizzes, tests, and post-training evaluation tools. Independently update lesson plans based on policy changes, staff feedback, new process requirements, and system enhancements. Lead the planning and execution of on-site and virtual training events: reserve rooms, schedule Teams meetings, prepare supplies, coordinate equipment, deliver materials, and administer evaluations. Identify training needs by monitoring error trends observed during transaction reviews and escalate findings to management to support workforce development planning.
25%	E	May act as a lead on various OTS duties, assignments, and projects, including but not limited to DHR database updates, recruitment, internal form updates, Telework Stipend processing, Pay Differentials, mass updates, mass mailings, Open Enrollment and the Benefits Fair, MIRS (including monitoring and complex corrections), Leave Buy-Back/Cash-Out programs, researching past practices and policies, and evaluating projects to ensure departmental mission and goals are met. Export and import data using multiple programs such as Microsoft Office 365, Excel, and FileMaker Pro, and prepare final reports for management in response to inquiries from Accounting, CalHR, DOF, and other agencies as needed. Export MIRS reports using Excel to merge large volumes of data to generate PAR forms, PIP forms, and Microsoft Word mail merges. Retrieve various CalPERS reconciliation reports, create user-friendly spreadsheets, and reconcile data. Support staff by providing technical guidance on resolving complex transaction errors, adjusting entries, interpreting system messages, navigating CLAS/LAB errors, ROAD, benefits, and updating SCO history. Review Personnel Action Requests (PARs), Employee Action Requests (EARs), PARFs, benefits transactions, employment history records, garnishments, accounts receivable, and salary advances.
20%	E	Write new and/or update existing TPMs, job aids, standard work, and procedural documents for OTS. Identify processes that are unclear, outdated, inconsistent, or non-compliant; notify management and recommend appropriate revisions. Provide training-related reports and special project deliverables to leadership.
10%	E	Research, interpret, and apply CalHR Pay Letters, MOU agreements and side letters, SCO Personnel Letters, CalPERS Circular Letters, SPB rules, Government Codes, DOF guidance, and departmental policy updates to ensure all training content remains compliant. Research and prepare responses to Labor Relations (LR) complaints and grievances based on applicable MOUs, Government Codes, Labor Codes, SPB Rules, and CalHR laws and regulations. Collaborate with control agencies to resolve discrepancies and obtain clarification on technical issues. Maintain positive working relationships with all control agencies to support issue resolution and ensure consistent application of statewide policies.

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10%	E	Serve as the primary ACA Coordinator for OTS. Independently analyze, process, and distribute ACA compliance reports to staff and management. Review employee eligibility and status in accordance with the Employer Shared Responsibility Provisions of the ACA. Provide guidance to staff on the accurate completion and correction of ACA-related entries in SCO systems. Identify process inconsistencies, complex eligibility issues, and compliance risks; document findings and present recommended corrective actions to management. Update internal ACA desk guides, job aids, and procedural documentation as regulations change. Prepare all monthly, quarterly, and annual ACA reports required by CalHR, SCO, and external vendors. Maintain ACA records and ensure accuracy across datasets, including SCO history, time base, leave usage, and hours worked. Analyze internal and external audits by providing detailed documentation, calculations, and clarifications.
5%	E	Act as the lead for researching, drafting, and updating Personnel Information Bulletins (PIBs) and Management Information Bulletins (MIBs) for department-wide distribution. Analyze bargaining unit agreements, Government Codes, departmental policies, SPB rules, and communications from SCO, CalPERS, and CalHR to ensure compliance. Write policy updates in clear, accessible language for department staff. Coordinate with program SMEs and management to ensure technical accuracy and consistency. Format bulletins according to DHR standards and maintain an archive on the L-Drive.
5%	M	Write and publish the weekly "What's New" newsletter for OTS. Create content, verify accuracy, organize the layout, determine relevance, and ensure timely posting to the DHR website. Maintain a publication rotation, manage version control, and track content that requires follow-up in future editions. Assist management in preparing additional HR bulletins or newsletters as needed.

¹ESSENTIAL 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. May act as a lead analyst on various training and policy duties, assignments and projects.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must be able to perform professional-level analytical work with a high degree of complexity to resolve administrative problems and recommend effective courses of action. The incumbent must reason logically and creatively, provide consultation and guidance on a wide range of subjects, and demonstrate the capacity to assume increasing administrative responsibility. Must quickly grasp new information and master new technical and business knowledge, and adjust rapidly to situations requiring immediate attention and resolution. Requires knowledge of SPB and CalHR laws, rules, policies, and practices; SCO's automated payroll system; Caltrans' automated time-reporting system (Staff Central); and the California Leave Accounting System (CLAS). Must be able to effectively interpret civil service laws and rules and various personnel manuals from SCO, CalPERS, and CalHR, as well as departmental procedures and Memoranda of Understanding (MOUs). Requires skill and ability to use computers for word processing, creating spreadsheets and pivot tables, performing mail merges, developing newsletters, updating fill-in-field documents, and creating or maintaining databases. This includes proficiency in Microsoft Word, Microsoft Excel, Microsoft Publisher, Adobe Acrobat Pro, FileMaker Pro, Microsoft Teams, and WebEx. Must be able to speak and write effectively, analyze situations accurately, and take effective action.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for effectively planning, coordinating, and executing office policies and procedures as they relate to the Office of Transaction Services. Poor judgment in monitoring, evaluating, or reporting information could affect staff's ability to provide quality personnel and payroll-related services to internal and external customers. The incumbent is also 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, and similar data. Failure to safeguard confidential information may damage DHR's reputation, result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could lead to disciplinary action, including termination of employment.

PUBLIC AND INTERNAL CONTACTS

The incumbent will work with Caltrans OTS staff and all levels of Caltrans staff, management, consultants, private sector groups and representatives of control agencies. Must work with others in a cooperative manner and demonstrate a positive attitude.

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Incumbent may be required to sit for long periods of time using a keyboard and monitor, and may be required to lift, carry, and move boxes of material from one location to another. Will occasionally be required to bend, stoop and kneel; pull, push or grasp objects; stand for long periods of time, and twist the body or neck in a sideways motion, either seated or standing. Incumbent must sustain concentration level needed for reviewing material, auditing, problem solving and reasoning, and must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Incumbent may deal with difficult people and must have the ability to develop and maintain cooperative working relationships; resolve emotionally charged issues reasonably and diplomatically; consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations; be tactful and treat others with respect.

WORK ENVIRONMENT

While at their base of operation, the incumbent will work in a climate-controlled office under artificial light; however, periodic heating and air-conditioning issues may cause occasional temperature fluctuations. This position may be eligible for telework. The amount of telework is at the discretion of the Department and is 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.

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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

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

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE