

PROPOSED

RPA NUMBER (HR USE ONLY)

25-214

ALERT: This form is mandatory for all Requests for Personnel Action (RPA).

INSTRUCTIONS: Before completing this form, read the instructions located on last page.

Section A: Position Profile

A. DATE 07/31/2026	B. APPOINTMENT EFFECTIVE DATE	C. INCUMBENT NAME
D. CIVIL SERVICE CLASSIFICATION Information Technology Associate		E. POSITION WORKING TITLE IT Support Analyst
F. CURRENT POSITION NUMBER 695-246-1402-006		G. PROPOSED POSITION NUMBER (Last three (3) digits assigned by HR) 695-246-1401-xxx
H. OFFICE / SECTION / UNIT / PHYSICAL LOCATION OF POSITION OAS/IITS/IBA/Business Systems & Policy Branch/Business Systems Analysis Unit		I. SUPERVISOR NAME AND CLASSIFICATION Christine Hefler, Information Technology Manager I
J. WORK DAYS / WORK HOURS / WORK SHIFT (DAY, SWING, GRAVE) MONDAY – FRIDAY 8:00AM – 4:30PM		K. POSITION REQUIRES: FINGERPRINT BACKGROUND CHECK ☐ YES ☒ NO DRIVING AN AUTOMOBILE ☐ YES ☒ NO

Section B: Position Functions and Duties

Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).

	Information Technology Domains (Select all domains applicable to the incumbent's duties/tasks.) ☐ Business Technology Management ☐ IT Project Management ☒ Client Services ☐ Information Security Engineering ☐ Software Engineering ☐ System Engineering
	Organizational Setting and Major Functions Under the general direction of Information Technology Manager I (IT Mgr I), the Information Technology Associate (IT Assoc) serves as a functional support analyst in the Business Systems & Analysis Unit. The position provides internal client support for CDT's human resources, learning management, and financial applications/systems (currently Oracle PeopleSoft) and related IT projects. The incumbent performs daily technical operational support and maintenance duties for the Oracle PeopleSoft ERP applications. The incumbent works independently to provide first-level troubleshooting support for CDT's internal business applications. The position provides functional business analysis and project support for system enhancements and upgrades.
% of time performing duties 35%	Essential Functions (Percentages shall be in increments of 5, and should be no less than 5%). Business Analysis Support • Provide business analysis for requested enhancements to CDT's internal business systems and applications, currently Oracle PeopleSoft Enterprise Resource Planning (ERP) utilizing Human Capital Management (HCM), Enterprise Learning Management (ELM), and legacy Financials. • Assist with requirements analysis, gather and document business requirements for application functionality and enhancements. • Support with solution design/problem solving and translate business needs into functional specifications for application development or configuration. • Assist with application configuration and customizations to align with business processes and requirements. • Conduct functional testing and validation, ensuring the system/application meets business requirements. • Identify opportunities for process improvement to optimize application functionality and business workflows.
35%	Application Systems Support • Provide first-line systems support for CDT's internal business systems and applications, currently Oracle PeopleSoft Enterprise Resource Planning (ERP) utilizing Human Capital Management (HCM), Enterprise Learning Management (ELM), and legacy Financials. • Utilize ServiceNow ITSM to monitor, document, and resolve incidents and service requests. • Troubleshoot and resolve application-related incidents or service request tickets by collaborating with technical teams and business users. • Interface and transmit data files with external systems and departments. • Create and maintain documentation related to application configurations, processes, job aids, and procedures. • Provide end user support and training, ensuring effective application adoption and usage.

30%

Application Lifecycle and Project Support

- Perform functional analysis and project support in human resource and payroll system related projects including, but not limited to, the California Statewide Payroll System (CSPS) project.
- Develop and maintain functional expertise for CDT and State Controller Office (SCO) legacy human resource and payroll systems and associated business processes.
- Participate in the system development lifecycle for new projects or enhancements to existing CDT systems by performing activities including planning, business requirements development, system design, testing, and implementation.
- Work as a team member to assist in the documentation of requirements, test plans, project timelines, and/or system changes.
- Coordinate with team members, end users, and stakeholders to ensure design, development, testing, and implementation tasks are completed.
- Review and analyze policies, standards, and processes to assess and address business needs.

5%

Marginal Functions (Percentages shall be in increments of 5, and should be no more than 5%.)

In support of the Business Systems & Policy Support Manager (IT Manager I), the IT Associate will assist with responding to all issues related to CDT's internal business applications. The IT Associate may participate in meetings alongside the manager or other senior staff, representing the Business Systems & Policy Support Branch as appropriate, including meetings with department executive management, control agencies such as the State Controller's Office (SCO), Bureau of State Audits, Department of Financial Information System for California (FI\$Cal), California Human Resources (CalHR), and other agencies interfacing with the department's administrative applications.

Work Environment Requirements

- Work in a standard business office environment.
- May be required to work weekends or off shift hours.

Allocation Factors (Complete each of the following factors.)

Supervision Received:

The IT Associate receives supervision and general direction from the IT Manager I.

Actions and Consequences:

Unfavorable decisions and recommendations made by the IT Associate may have a serious and economic impact on CDT. The IT Associate is required to exercise sound judgment to reduce departmental risks such as inaccurate financial data, or inefficient service delivery which could negatively impact CDT business teams' ability to perform their jobs.

Personal Contacts:

On the departmental level, contacts range from the executive office, branch chiefs, and staff. Other contacts include but are not limited to the State Controller's Office, Bureau of State Audits, California Human Resources (CalHR), FI\$Cal, and customer departments

Administrative and Supervisory Responsibilities (Indicate "None" if this is a non-supervisory position.)

n/a

Supervision Exercised:

n/a

Other Information

Desirable Qualifications: (List in order of importance.)

- Experience conducting business analysis and soliciting, understanding, and verifying business requirements
- Experience with State payroll, leave accounting, and position management systems. CDT currently uses SCO legacy systems and PeopleSoft Enterprise Resource Planning (ERP) Human Capital Management.
- Knowledge of and experience with PeopleSoft Enterprise Resource Planning (ERP) Human Capital Management, Enterprise Learning Management, and Financials
- Demonstrated ability to communicate technology fundamentals to business teams
- Knowledge of core human resources and financial business processes and operations.

- Knowledge and experience utilizing ServiceNow.
- Knowledge and experience utilizing collaborative tools including SharePoint, Microsoft Teams
- Knowledge and experience in project management practices for managing application upgrades, migrations, and other IT projects.
- Knowledge and experience in change management involving business processes and organizational change
- Knowledge and experience in Systems Development Life Cycle (SDLC), including Agile, Waterfall, and hybrid methodologies.
- Knowledge and experience working in a large, complex, and customer-focused service delivery environment

INCUMBENT STATEMENT: I have discussed the duties of this position with my supervisor and have received a copy of the duty statement.

INCUMBENT NAME (PRINT)	INCUMBENT SIGNATURE	DATE
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SUPERVISOR STATEMENT: I have discussed the duties of this position with the incumbent.

SUPERVISOR NAME (PRINT)	SUPERVISOR SIGNATURE	DATE
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Instructions			
Copies and Distribution	<u>Current and Proposed Duty Statements</u>: Submit with Request for Personnel Action (RPA) package. <u>Approved Duty Statement</u>: Supervisor reviews with incumbent; both supervisor and incumbent must sign and date. <u>Signed Copies</u>: Original to supervisor; copy to incumbent; scanned/electronic version emailed to Human Resources.		
Section A: Position Profile	Complete Sections A through K. If position number is changing, complete sections D, E, G, and H using the proposed position information. If incumbent's name is known, complete section C.		
Section B: Position Functions & Duties	Identify the major functions and associated duties, and the percentage of time spent annually on each (list higher percentages first).		
Information Technology Domains	Select all domains applicable to the incumbent's duties/tasks.		
Organizational Setting and Major Functions	Provide a <u>brief</u> description of the position's reporting relationship, primary role, and purpose.		
Essential Functions	Identify the fundamental job duties of the position that must be performed, with or without reasonable accommodation. NOTE: Essential Functions shall be properly aligned with the classification specification. Percentages shall be in increments of 5, and should be no less than 5%. The total percentage of all functions (essential and marginal) must equal 100%. Per Government Code section 12926.1 (a-c), a job function or task may be considered an essential function for several reasons, including, but not limited to: - The position exists to perform the function. - There are a limited number of other employees available to perform the function, or among whom the function can be distributed. - The function is highly specialized; the person is hired for special expertise or ability to perform the function. - Removal of the function would fundamentally alter the job. To write essential functions for the position: - Identify the major functions of the job. Most positions have five to seven major functions. - Identify the specific tasks associated with each major function (include end products). - Identify the level of work and why the work is done. The below is an example of how to write an essential function and the associated task statements: ESSENTIAL FUNCTIONS <table border="1"> <tr> <td>45%</td> <td> Provide complex analytical support, and complete various sensitive assignments and documents in consultation and coordination with a variety of management, staff, and others using proven research techniques and analytical and writing skills. <u>Associated Tasks Statements</u> - Research, develop, and/or review a variety of documents, including STMM policies, procedures, and contract implementation-related documents, including contract exemption requests, Statements of Work, and other related items. - Conduct surveys, analytical studies, and other related activities to develop pertinent informational resources on telecommunications programs, issues, and customer utilization. - Follow up on statewide telecommunications-related laws, policies, procedures, and documents [e.g., Request for Information (RFI), Request for Proposal (RFP), Management Memoranda]. </td> </tr> </table>	45%	Provide complex analytical support, and complete various sensitive assignments and documents in consultation and coordination with a variety of management, staff, and others using proven research techniques and analytical and writing skills. <u>Associated Tasks Statements</u> - Research, develop, and/or review a variety of documents, including STMM policies, procedures, and contract implementation-related documents, including contract exemption requests, Statements of Work, and other related items. - Conduct surveys, analytical studies, and other related activities to develop pertinent informational resources on telecommunications programs, issues, and customer utilization. - Follow up on statewide telecommunications-related laws, policies, procedures, and documents [e.g., Request for Information (RFI), Request for Proposal (RFP), Management Memoranda].
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Marginal Functions	Identify functions or tasks that are performed, but are not fundamental duties of the position. These are functions or duties that can be assigned to another employee and can be characterized as non-essential or marginal. The phrases "perform other related duties" or "perform other related work" can be used in the marginal functions field. NOTE: Percentages shall be in increments of 5, and should be no more than 5%. The total percentage of all functions (essential and marginal) must equal 100%.		
Work Environment Requirements	Identify physical or mental requirements, work conditions, hazards, and equipment used on the job and required to perform the essential functions of the job. NOTE: Specify in this section if a fingerprint background check is required.		
Allocation Factors	<u>Supervision Received</u>: Identify the scope of initial instruction, how work is supervised while in progress, and nature and purpose of final review. <u>Actions and Consequences</u>: Identify in what areas judgment, decisions, and recommendations are made, and probable effects of poor decisions or recommendations. <u>Personal Contacts</u>: Identify with whom, how frequently, and for what purpose personal contacts are required with persons outside of the immediate work group. <u>Administrative and Supervisory Responsibilities</u>: Briefly identify the extent of participation in management functions (e.g., planning, budgeting, cost control, reporting, selecting, placement, and development of personnel). Indicate "None" if a non-supervisory position. <u>Supervision Exercised</u>: Identify the type of supervisory responsibility exercised and indicate whether supervision is a responsibility of the position or of a lead nature.		
Other Information	Identify any significant factors or special requirements for this position that are not included elsewhere on this form. <u>Desirable Qualifications</u>: Identify any special personal characteristics, interpersonal skills, additional qualifications, specific business needs, and additional attributes that will enhance the incumbent's ability to perform a particular function. (e.g., professional certification or license, general or specialized knowledge in the field, ability to qualify for a fidelity bond, aptitude for investigative work, skills and abilities above the required minimums.) NOTE: Please list the desirable qualifications in order of importance, as they will be listed on the Job Opportunity Bulletin (JOB).		