

DUTY STATEMENT

EFFECTIVE DATE

BRANCH

Administrative Services

POSITION NUMBER (Agency – Unit – Class – Serial)

815 - 223 - 5393 - 028

DIVISION/UNIT

Human Resources/Personnel Services

CLASS TITLE

Analyst II

INCUMBENT NAME

WORKING TITLE

Benefits & Leave Management Analyst

CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.

Under the general direction of the Benefits & Leave Management Manager (Supervisor II), the Analyst II operating as the Benefits & Leave Management Analyst independently administers health benefits, leave, pay, and wage replacement programs for their assigned units for the organization. Leave and wage replacement programs may include Personal, Military, Family Medical Leave Act, Worker's compensation, State Disability Insurance, Non-industrial Disability Insurance, catastrophic, etc.

% of time performing duties

Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.

35%

ESSENTIAL FUNCTIONS

Independently administer leave and wage replacement programs to ensure compliance with policies, procedures, and state and federal mandates, laws, and rules. Provide consultative services, guidance, and options to leadership and employees, including analyzing options to assist in making informed decisions regarding leave and wage replacement options. Manage leave cases, including extensions of probationary periods, drafting option and return to work letters. Partner with the Payroll Unit, Equal Employment Opportunity Office, and Performance Development on leave cases. Establish and communicate with the Employment Development Department (EDD) during the claims process, extensions of claims and approvals. Maintain contact with State Fund (SF) to track approvals on pending and/or active claims for Industrial Disability Leave (IDL) and Temporary Disability (TD). Maintain management status reports of all leave cases and update appropriate tracking logs.

35%

Consult with and provide information to employees enrolling or changing health and dental plans. Analyze and process enrollment authorization forms for employees to ensure eligibility criteria are met. Review and revalidate eligibility for dependents enrolled in health benefits through the Dependent Re-verification process. Ensure eligible dependents are enrolled and remove unverified dependents from benefit coverage. Process enrollments for employees electing participation in FlexElect Cash Option and/or Reimbursement Accounts. Process enrollments for Consolidated Benefits (COBEN). Process enrollment into the Group Legal Program, Long Term Disability, Vision Services Plan, etc. Conduct thorough benefits orientation with employees who are new to CalSTRS, new to state service, or changing from rank and file to excluded.

25%

Independently process the accounts receivables (AR) for assigned units by informing impacted staff, notifying the employee of the impending AR, and ensuring a repayment plan is established. Collaborate with Financial Services/Accounts Receivables by providing information on payment detail for all ARs for input in BusinessDirect. Regularly reconcile the ARs to assure accuracy.

5%

MARGINAL FUNCTIONS

Provide training to payroll staff, collaborate on special projects and prepare management reports.

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

815-223-5393-028

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies located in the [Competency Guide](#) on Central.

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives, and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Ability to support and model CalSTRS Core Values
- Must maintain confidentiality

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer keyboard several hours a day
- Read from computer screens several hours a day

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Administrative Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 223 - 5157 - XXX	
DIVISION/UNIT Human Resources/Personnel Services/Benefits & Leave Management	CLASS TITLE Analyst I	
INCUMBENT NAME Vacant	WORKING TITLE Benefits & Leave Management Analyst	
CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.		
Under the supervision of the Benefits & Leave Management Manager (Supervisor II), the Analyst operating as the Benefits & Leave Management Analyst administers health benefits, leave, pay, and wage replacement programs for their assigned units for the organization. Leave and wage replacement programs may include Personal, Military, Family Medical Leave Act, Worker's compensation, State Disability Insurance, Non-industrial Disability Insurance, catastrophic, etc.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.	
35%	ESSENTIAL FUNCTIONS Administer leave and wage replacement programs to ensure compliance with policies, procedures, and state and federal mandates, laws, and rules. Provide consultative services, guidance, and options to leadership and employees, including analyzing options to assist in making informed decisions regarding leave and wage replacement options. Process leave cases, including extensions of probationary periods, drafting option and return to work letters. Partner with the Payroll Unit, Equal Employment Opportunity Office, and Performance Development on leave cases. Establish and communicate with the Employment Development Department (EDD) during the claims process, extensions of claims and approvals. Maintain contact with State Fund (SF) to track approvals on pending and/or active claims for Industrial Disability Leave (IDL) and Temporary Disability (TD). Maintain management status reports of all leave cases and update appropriate tracking logs.	
35%	Consult with and provide information to employees enrolling or changing health and dental plans. Analyze and process enrollment authorization forms for employees to ensure eligibility criteria are met. Review and revalidate eligibility for dependents enrolled in health benefits through the Dependent Re-verification process. Ensure eligible dependents are enrolled and remove unverified dependents from benefit coverage. Process enrollments for employees electing participation in FlexElect Cash Option and/or Reimbursement Accounts. Process enrollments for Consolidated Benefits (COBEN). Process enrollment into the Group Legal Program, Long Term Disability, Vision Services Plan, etc. Conduct thorough benefits orientation with employees who are new to CalSTRS, new to state service, or changing from rank and file to excluded.	
25%	Process the accounts receivables (AR) for assigned units by informing impacted staff, notifying the employee of the impending AR, and ensuring a repayment plan is established. Collaborate with Financial Services/Accounts Receivables by providing information on payment detail for all ARs for input in BusinessDirect. Regularly reconcile the ARs to assure accuracy.	
5%	MARGINAL FUNCTIONS Collaborate on special projects and prepare management reports.	
COMPETENCIES Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies: • Adaptability/Flexibility • Communication • Customer/Client Focus • Teamwork • Work Standards/Quality Orientation		

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SUPERVISOR'S SIGNATURE

DATE SIGNED

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EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED