



DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00066	Effective Date
Classification Title Senior Personnel Specialist	Position Number 564-182-1317-009
Working Title Senior Personnel Specialist	Bureau and Section Business and Human Resources Bureau Personnel Services Section

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. To support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the general direction of the Administrator I, as the subject matter expert for various Personnel related programs, the incumbent handles the most difficult, sensitive, and complex personnel and payroll issues. Research critical personnel problems and recommends alternative solutions. Develops and provides specialized training programs to staff, employees, and management. Reviews various control agency letters, memos, and bargaining contract provisions and develops internal procedures as necessary. Prepares management reports, spreadsheets, and charts. Drafts correspondence. Functions as a team member on personnel-related projects. Acts as a coordinator on a variety of personnel and payroll programs. Provides support and direction for transactions workloads. Actively works towards creating a strong team environment within the unit. Effectively communicates with employees, management, and control agencies. Demonstrates flexibility while working within the framework of laws, rules, policies, and guidelines to independently process documents for Franchise Tax Board (FTB) employees. Demonstrates commitment to provide customers with accurate and timely assistance in all areas of responsibility.

Essential Functions

Percentage	Description
40%	Independently processes various Medical Leaves of Absence and Military Leaves. Assist employees with questions and options that may be available. Key employment history transactions, monitor payroll and benefits, and calculate

	probation completion. Requests regular payroll such as time worked and/or supplementation, as well as special payments, such as Health Stipend(s) and/or Telework Stipend. Processes Catastrophic Time Bank requests, keys donations, and tracks the duration of the case. Utilizes various resources, such as State Controller's Office (SCO) and California Department of Human Resources (CalHR) manuals and letters, policies, procedures, laws, rules, regulations, and Memorandum of Understandings (MOUs). Works in various systems such as the SCO database, CalHR Net, myCalPERS, and Microsoft Office (Outlook, Excel, and Word). Contacts various entities and control agencies, as well as internal and external organizations, such as SCO and Employee Development Department (EDD), to obtain information, guidance, and/or clarification on complex issues. Keeps applicable parties informed on status.
40%	Manages Retirement cases by conducting meetings with employees, reviewing benefits options, and calculating final lump sum values, including Savings Plus plan deferrals. Reconciles leave credit balances in eTime and California Leave Accounting System (CLAS) systems, and processes retiree benefit enrollment forms. Assists employee by providing retirement guidance and acts as a liaison to California Public Employees' Retirement System (CalPERS).
15%	Provides benefit forms to Retirement and Medical Leave of Absence employees when applicable. Research benefits-related questions, such as rates, plan availability, and effective dates, and processes forms by keying/sending to the appropriate agency/carrier. Ensures all leave balances are reconciled for Retirement cases before processing lump sum, as well as Medical Leave of Absence cases by keying appropriate qualifying pay periods and supplementation each month.

Marginal Functions

Percentage	Description
5%	Acts as a Subject Matter Expert for Personnel Transactions Unit staff and is assigned difficult and complex personnel and payroll matters, such as special projects, as needed.

Employee:

I confirm that I have read and understand the described duties and functions of this position.

Name (Print)

Signature

Date

Supervisor:

I certify that the above information accurately represents the described duties and functions of this position.

_____	_____	_____
Name (Print)	Signature	Date