



Duty Statement

Classification: **Analyst II**

Position Number: **275-440-5393-032**

HCM#: **1727**

Branch/Section: **Disability & Survivor Benefits Division / Disability Retirement Section / Disability Retirement Processing & Appeals**

Location: **Sacramento, CA**

Working Title: **Disability Validation Analyst**

Effective Date: **January 1, 2026**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: ☐ Yes ☒ No

Telework: ☒ Office-Centered ☐ Remote-Centered ☐ Not Eligible

The Disability & Survivor Benefits Division (DSBD) provides benefits and information to members, retirees, beneficiaries, and survivors. Services include eligibility for and calculation of disability retirements, pre- and post- retirement death benefits, and adjustments. DSBD is composed of the following three sections: Disability Retirement, Survivor Benefits, and Training & Support.

The Disability Retirement section analyzes, processes, and determines eligibility for Disability Retirement (DR) and Industrial Disability Retirement (IDR) benefits, as well as processes reinstatement from DR/IDR retirement, working after retirement requests, reevaluations, and unlawful employment. The section is also responsible for processing DR/IDR determination and reinstatement appeals, processing Local Safety determinations, ensuring the validity of disability and industrial disability retirement applications, recruiting Independent Medical Examination (IME) physicians, reviewing and screening IME candidate applications, educating various employer groups, employee organizations, and internal team members on the disability retirement program.

Under the direction of the Supervisor I in the Disability Retirement Section, the Analyst II performs the following duties and responsibilities:

Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

40% Onsite¹ and virtually, works with the Legal Office Investigation Unit as part of the Disability Validation Team and identifies potential disability fraud. Administers the disability appeal outcomes, attends legal hearings, and testifies as a witness for CalPERS. Conducts legal and

policy research to identify key statutory or regulatory issues with DR and IDR cases, evaluates viable alternatives, and prepares written analyses and formal requests for legal opinions or legislative review. These documents clearly document the issue, supporting facts, and recommended actions in accordance with CalPERS guidelines. Independently reviews, analyzes, evaluates, and determines eligibility for DR and IDR benefits for state, local miscellaneous, school, and state safety and industrial members. Analyze and resolve DR/IDR issues through the review of job descriptions and medical documents from various sources, determine the need for additional information from appropriate source(s), and identify the necessity for an Independent Medical Examination (IME) and/or Job Assessment. Interpret medical reports using knowledge and familiarity of general medical terms, diseases, and conditions and apply this knowledge to the Public Employee Retirement Law (PERL) and court decisions regarding testing of "substantial incapacity for the performance of duties" in order to make a determination of DR/IDR eligibility. Summarize the medical and vocational information on the case worksheet to clearly support the conclusion and recommendation of approval or denial of DR/IDR benefits. For the denial of benefits, provide written recommendations to the Section Leader and Division Chief for concurrence. Provide written notification of the decision to both the member and the employer.

- 25% Onsite and virtually, analyze cases to detect potential indicators of fraudulent claims and notify the Disability Validation Team when such indicators are identified. Make determinations on IDR cases regarding the industrial nature of a member's disabling condition by reviewing and analyzing input from State Compensation Insurance Fund, Workers' Compensation, and other sources. Independently approve members for DR or IDR benefits in myCalPERS system or determine the need for resolution by the Workers' Compensation Appeals Board and provide written notification to the member.
- 10% Onsite and virtually, as required, conduct required research to analyze and identify key issues of a disability matter to provide various solutions or alternatives, and prepare requests for legal opinions, administrative remedies, and legislative analysis in accordance with CalPERS guidelines. Include documentation that supports the conclusions and recommendations which are consistent with the identified problems, alternatives, or solutions. Serve as the lead analyst to mentor entry-level analysts. Work closely with the team leader to review cases for quality assurance, provide feedback on identified issues and trends, and collaborate with leadership to recommend and implement changes to procedures, utilizing your subject matter expertise.
- 10% Onsite and virtually, independently respond both verbally and in writing to inquiries from members, employers, physicians, job assessors, attorneys, legislators, and employee representatives by providing information, requesting documentation, and explaining case status or next steps in accordance with established laws, policies, and procedures. Respond to written and/or verbal correspondence and complete required follow-up actions in alignment with departmental procedures and time frames.
- 10% Onsite and virtually, conduct structured internal analysis to evaluate proposed policy or procedural changes and assess operational impact within the section, and prepares written recommendations for section leader review and approval. Topics include work simplification studies and statistical analysis of workload including projection of staffing needs. Prepare

implementation plans for leadership review and approval that include methods of monitoring, and conduct post-implementation study that includes any modifications to procedures.

- 5% Onsite and virtually, participate in regularly scheduled meetings, such as one-on-one meetings with team leader, team meetings, and section meetings. Attend required trainings, including new procedure, refresher, and medical trainings. Actively engage in all meetings, including taking notes and following up on assigned action items as applicable. Participate in special projects and group activities related to disability and industrial disability retirement. Complete CalPERS mandatory training in accordance with departmental procedures and established timeframes. Perform other duties as assigned that are appropriate for this classification.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Work in a high-rise building in downtown Sacramento.
- Occasional overnight travel required.

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance).
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

Employee Name (Print): _____

Employee Signature: _____ **Date:** _____

I certify that the above accurately represents the duties of the position.

Supervisor Signature: _____ **Date:** _____