

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

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

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

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45%	E	Acts as a staff resource, lead, and trainer to Personnel Specialists and Senior Personnel Specialists within OTS. Reviews Personnel Specialists' completed work and answers general and complex technical questions from staff. Ensures personnel transactions are in conformance with departmental and control agency policies and procedures, labor contracts, as well as the various governmental laws, rules and regulations. Reviews training concepts with new Personnel Specialists to ensure understanding and ease of implementation which includes discussing errors and assisting with corrections. Meets with Personnel Supervisor I, as needed, providing feedback on Personnel Specialists' work, recommending additional training if necessary, and progress to be included in performance reports and other documents. Monitor and track workload for completion, e.g. separations, Position Action Request Form (PARF) appointments, health enrollments, leave buy back, using various logs and databases, such as Excel, TEAMS, Filemaker Pro, and control agency databases (MOBIUS/COGNOS). Provides assistance with vacant and backlogged work, which may entail transacting all facets of Personnel Specialist work including, but not limited to: Personnel Action Request documentation, updating employment history, keying and releasing pay, keying appointment and separation documents, processing health and dental forms, and leave balance reconciliation.
20%	E	Serves as an expert resource and point of contact in resolving the most complex departmental personnel issues relating to personnel transactions, including: health and dental appeals, salary determinations, employment history and payroll record reconstructions, formulating and recommending process improvements, and ensuring compliance with regulations, policies, laws, and rules. Independently researches laws, rules, and regulations to ensure accurate, clear documentation, and communication. Compiles data and information to generate reports and written analyses.
20%	E	Researches and prepares responses to Labor Relations timely regarding inquiries and/or grievances, maintaining log and completing file, taking appropriate corrective actions as necessary, and attending bi-monthly meetings reporting on status. Assists Transactions staff in dealing with intricate personnel issues (i.e. SPB lawsuits or penalty and interest lawsuits). Personally performs the most complex duties and makes recommendations to management on corrective measures.
10%	E	Attends staff meetings, monthly program meetings and control agency forums as necessary. Participates in trainings and conferences. Assists Supervisor Is with recruitment, including downloading applications from CalHR's Exam and Cert Online System (ECOS), screening applications, updating screening criteria, scheduling interviews, and coordinating with internal and external partners to facilitate the hiring process.
5%	M	Participates on special projects and workgroups, and assist in completing special projects as directed. Assists in researching past practices and policies and evaluate projects to ensure departmental mission and goals are met.

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

Incumbent must be able to perform professional level analytical work with a high degree of complexity to resolve administrative problems and make recommendations for an effective course of action. The incumbent must reason logically and creatively, consult and advise on a variety of subject matters and demonstrate a capacity for assuming increasing administrative responsibility. Must grasp the essence of new information and master new technical and business knowledge. Must adjust rapidly to new situations warranting attention and resolution. 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).

Ability to effectively interpret civil service laws and rules and various personnel manuals from SCO, CalPERS and CalHR, as well as departmental procedures and Memorandum of Understandings (MOUs). Must have skills and ability to use computers to perform word processing, develop spreadsheets, create pivot tables, perform mail merge, develop newsletters, update documents to fill-in-fields, create and update databases, including Microsoft Word, Microsoft Excel, Microsoft Publisher, Adobe Acrobat Pro, FileMaker Pro, Microsoft Teams, and WebEx. Ability to speak and write effectively; analyze situations accurately

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and take effective action.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for effectively planning, coordinating, and executing office policy and procedures as they relate to the Office of Transactions Services. Poor judgment in monitoring, evaluating and reporting information could affect staff's ability to effectively provide quality personnel and payroll-related services to internal and external customers. The incumbent is 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, or similar information. Failure to protect departmental employee's confidential information may damage DHR's reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in 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.

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, incumbent will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. This position may be eligible for telework. The amount of telework is at the discretion of the Department and 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.

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

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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