

DUTY STATEMENT



☒ **CURRENT**
☐ **PROPOSED**

CIVIL SERVICE CLASSIFICATION Personnel Supervisor II		WORKING TITLE Transactions Supervisor II		
PROGRAM NAME Office of Administrative Services			UNIT NAME Human Resources	
ASSIGNED SPECIFIC LOCATION Sacramento			POSITION NUMBER 400 – 107-1314-007	
BARGAINING UNIT S01	WORK WEEK GROUP 2	BILINGUAL POSITION No	CONFLICT OF INTEREST FILER No	BACKGROUND CHECK No

General Statement

Under the general supervision of the Supervisor I, the Personnel Supervisor II supervises, trains, provides technical assistance, evaluates, and directs the work of the Transactions unit through Personnel Supervisor I position(s) who supervises a team of Personnel Specialists in the preparation, processing, and submission of documents related to a variety of personnel transactions, including payroll and benefits.

Candidates must be able to perform the following essential functions with or without reasonable accommodations.

Percentage of Time Spent	Duties <u>Essential Job Functions</u>
40%	Coaches, develops, and directs staff responsible for personnel transactions. Reviews documents submitted to and received from control agencies to ensure accuracy, compliance, and to determine if additional action is necessary. Maintains knowledge of and provides direction regarding rules, regulations, departmental policies, procedures, and bargaining unit contracts related to personnel and payroll functions in order to provide training and technical assistance. Serves as a subject matter expert regarding personnel transactions. Interprets California Department of Human Resources (CalHR) and State Personnel Board (SPB) laws, rules, and regulations, State Controller's Office (SCO) directives and DIR policies and procedures. Provides technical expertise on difficult and complex transactions. Provides training to staff and apprises/advises appropriate managers of outcomes. Researches, analyzes and oversees personnel, payroll, retirement, leave accounting, benefits, and disability transactions. Serves as a liaison between DIR and control agencies. Provides assistance and advice to managers and supervisors concerning personnel transactions. Gathers data from team members for response to monthly, quarterly, and annual report requests. Audits exception reports from control agencies and ensures appropriate corrective action. Oversees the administration of certain special assignments with department-wide impacts, including conflict of interest and succession planning. Serves as the technical resource/expert in assigned areas of responsibility.
35%	Plans, organizes, directs, and provides supervisory review of staff assignments. Conducts regular individual and team status meetings to identify workload issues, provide feedback, and communicate all team information. Provides regular and timely written performance appraisals to staff. Counsels staff and initiates

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	disciplinary actions as necessary. Recruits, hires, trains, develops, and provides leadership to staff. Ensures full compliance with state and federal laws, rules, regulations, bargaining unit contracts, and policies in all personnel practices, including, but not limited to: hiring, employee development, and management. Identifies appropriate long-range plans and goals to address succession planning and knowledge transfer. Establishes performance expectations for all staff. Develops staff work plans, monitors and evaluates progress, and ensures key milestones are met and on schedule. Develops unit goals, strategic and operational plans, and objectives to meet organizational objectives. Monitors, organizes, directs, and evaluates the quality and quantity of the unit's work and makes changes to ensure a productive and effective work environment. Assists with preparation and review of administrative directives and policies as well as procedures manuals for assigned areas of responsibility. Supervises staff in the management of potential workload bottlenecks and recommends appropriate courses of action. Establishes standards for customer service and ensures consistent execution.
15%	Researches, drafts, develops, and updates policies, procedures, forms, and memorandums related to Human Resources Transactions Operations functions using the processes of DIR's HR Office, bargaining contract provisions as well as control agency procedures such as those of the CalHR and SCO. Incorporates approved recommendations and revisions to ensure all related documents are current. Canvasses other departments and reviews their HR policies and procedures to aid in updating, revising, and establishing policies and procedures. Develops and provides training for staff, management, and division personnel liaisons. Reviews, revises, and maintains the quality and applicability of information on the intranet to ensure that the most current communication is provided.
5%	Provides recommendations to management on policy implementation, strategic plan development, and performance management-based processes and tracking tools. Assists in identifying and developing processes to improve applications, information sharing, and sound decision-making. Utilizes project management principles to efficiently and effectively employ team leadership to successfully complete assignments.
Percentage of Time Spent	Marginal Job Functions
5%	Performs other related duties as assigned including, but not limited to: serves on committees, special work teams, and task forces related to administrative services and department activities; reviews, evaluates, reports on the effectiveness of, and recommends revisions to administrative practices, procedures, and policies; and assists in developing documents and materials as recommended by management.

Conduct, Attendance, and Performance Expectations

This position requires the incumbent to maintain consistent and regular attendance; communicate effectively (orally and in writing) and with tact in dealing with the public and/or other employees; develop and maintain knowledge and skills related to specific tasks, methodologies, materials, tools, and equipment; complete assignments in a timely and efficient manner; and adhere to departmental policies and procedures.

Supervision Received

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The incumbent reports directly to and receives the majority of assignments from the Supervisor I within the Transactions Operations Branch. The incumbent also receives assignments from the Supervisor II, Manager I, Manager II, and Chief of Human Resources.

Supervision Exercised

The incumbent directly supervises incumbents in the classification of Personnel Supervisor I and indirectly supervises Personnel Specialists.

Work Environment, Special Requirements/Other Information, Physical Abilities, Additional Requirements/Expectations, and Personal Contacts

Work Environment

The incumbent works 40 hours per week in an office setting with elevator access, and a cubicle with natural and artificial lighting.

Special Requirements/Other Information

None.

Physical Abilities

The position requires; the ability to use a fax, multi-function copier, and other office equipment. Extensive use of a computer is required. Being in a stationary position for long periods of time. The Incumbent may be required to occasionally travel offsite to training courses or meetings.

Additional Requirements/Expectations

All DIR employees are expected to conduct themselves in a professional manner that demonstrates respect for all employees and others they come in contact with during work hours, during work-related activities, and anytime they represent the Department. Additionally, all DIR employees are responsible for promoting a safe and secure work environment, free from discrimination, harassment, inappropriate conduct, or retaliation.

Personal Contacts

The incumbent in this position has frequent contact with DIR staff, representatives from other state agencies, and the public in person, by telephone, and/or email. Much of this contact is of a sensitive and confidential nature.

Employee Acknowledgment

I have read and understand the duties listed above and certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform these assigned duties as described above with or without reasonable accommodation. If you believe a reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for a reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Medical Management Unit in the Human Resources Office.

Employee Name

Employee Signature

Employee Sign Date

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Supervisor Acknowledgment

I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee with a copy of this duty statement.

Supervisor Name

Supervisor Signature

Supervisor Sign Date

HUMAN RESOURCES OFFICE APPROVAL

LQ

C&S Analyst Initials

8/26/2026

Approval Date