



Position Information

Employee Name:

Position Title:

Senior Personnel & Compensation Specialist

Program:

HR Connect

Work Unit:

Transactions

Classification:

Senior Personnel Specialist

Report To:

Personnel Supervisor II

Collective Bargaining Identifier (CBID):

R01

Fair Labor Standards Act (FLSA) Status:

Covered, Work Week Group 2

Special Requirements

Conflict of Interest Designation: Not applicable.

Bilingual Position: Not applicable.

Rotational Assignment: Not applicable.

Program Information:

HR Connect exists to provide clients with quality, timely, and efficient HR services.

Purpose/Scope:

Under the general direction of the Personnel Supervisor II (PS II), the Senior Personnel Specialist (SPS) independently performs a full range of the most difficult and complex duties within the personnel transactions unit, including but not limited to, interpreting and applying personnel related laws, rules, policies, and procedures, to personnel appointments, payroll transactions, attendance records, and oracle reporting. The SPS researches critical personnel problems and recommends alternative solutions, requiring a thorough and detailed knowledge of appropriate laws, rules, and regulations from the California Department of Human Resources (CalHR), State Controller's Office (SCO), California Public Employees Retirement System (CalPERS), and other control agencies. This position is regularly required to complete a variety of personnel transactions and act as a lead/trainer in the areas of timesheets, attendance records, leave accruals, benefits, record keeping, personnel document processing, and a wide range of related personnel transactions functions while consistently exercising a high degree of confidentiality, initiative, responsibility, independence, and customer service when performing assigned tasks. Provide information and advice to retiring and separating State Fund employees via email, telephone, or in writing. Ensure retiring and separating employees receive their pay on time so State Fund is not in violation of AB-2410.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Follow State Fund's Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

35% Essential

- 1. Under general direction, process most difficult and complex personnel and payroll transactions such as, but not limited to, retirements/ separations with Lump sum deferral payroll, and Adverse Actions according to applicable State civil service laws and rules, control agency regulations and labor contract provisions.**
 - a. Assigned to maintain, monitor, modify and enter the necessary fields for separating employees on a flow basis.
 - b. Contact State Controller's Office to ensure that direct deposit is cancelled prior to posting of final pay.
 - c. Drafts email template to send to retiring/ separating employees requesting necessary documents. Ensures correspondence includes most current information and updates correspondence when necessary. Assists employee with completion of forms as needed.
 - d. Maintain communication with retiring employee, and provide consultation and facilitates the presentation of retirement seminars, as needed.
 - e. Utilize the Benefits Administration Manual (BAM) to process Retirement Dental form and key the completed forms into the CalPERS system.
 - f. Utilize BAM to accurately process enrollment in the Retiree VSP program, and fax the completed form to Vision Service Plan.
 - g. Project retiring and separating employees' total Lump Sum payout in compliance with Government code 19839, by using the State Calendar STD. 640 and the SCIF Lump Sum Worksheet. Once projected, documents the Personnel Action Request (PAR) and keys transaction into SCO database.
 - h. Calculate Retiring and Separating employees Lump Sum Deferral, if the employee is choosing to defer into a 401K or 457. Where applicable, utilize SCO Paycheck and or Lump sum calculators to determine total dollar amount available for deferral. If employee is electing to defer into 2 tax years, submits initial PAR to SCO at time of retirement. Per SCO's timeline, Calendar date when subsequent PAR is to be sent to SCO.
 - i. Communicate with Manager Services about the processing and keying of Adverse Action dismissals. Ensures the issuance of final pay is timely, and in compliance with the verbiage in the action.
 - j. Ensures final pay, along with any applicable supplementation pay, is issued timely, in compliance with Assembly Bill 2410, timely for all assigned separations.
 - k. Check if Retiring/Separating employee has a PCard through the Oracle system.
 - l. Verify that Retiring/Separating employee does not have any Accounts Receivable's, Salary Advances, Garnishments or outstanding Travel Advances.
 - m. Call CalPERS to confirm the Separating employee's Retirement date.
 - n. Monitor separating employee's leave balances in State Fund Oracle Time and Labor (OTL) system.

- o. View negative leave balance report to ensure that the Separating employee does not have a negative leave balance.
- p. Reviews monthly and quarterly reports from the ACA database ensures ACAS database is updated with correct separation code and date.
- q. Prepare COBRA notification when needed, and forward to employee via certified mail.
- r. Ensure all applicable tasks are completed and dated on the Separation Checklist
- s. Scan Separation/Retirement/Dismissal documents into Perceptive Content (ImageNow) and scan/index to employee's Personnel File.
- t. Ensure all tasks in separation cases are completed properly before closing, then close tasks and forward the case to the Transactions Manager for final review and closure.

35% Essential

2. **Maintain a roster of approximately 150 employees. Duties include, but are not limited to, reconciling attendance to monthly payroll warrant register, and certifying monthly payroll (positive/negative) in the State Controller's Office (SCO) Master Payroll Certification (MPC) input system; verify and key dock, overtime pay, and special pay; Records additions, deletions, and/or omissions to monthly attendance reports (Form 672). Initiate, establish, and/or collect salary advances, garnishments, and accounts receivables; Work cases through the Case Management System (CMS) on daily, hourly basis. Respond to inquiries submitted by employees via CMS, email, and telephone. May be assigned as primary or back up for the executive roster with all CEA and Governor Appointees, including but not limited to tracking, onboarding, keying, and processing of special pay differentials. Ensures the timely establishment, collection, and clearance of outstanding ARs. Monitors the A/R Aging Report to ensure proper documentation on the progress and collection of ARs. Researches and resolves complex leave balance discrepancies and payroll problems including dock, overtime, and holiday credit.**
 - a. Prepare Personnel Action Request (PAR) document and keys appointments, miscellaneous, and separation transactions into SCO's Personnel Information Management System (PIMS). Calculate appropriate salary determinations for appointment transactions per the Cal-HR salary rules. Routes Notice of Personnel Action documents to employees when applicable.
 - b. Establish and change employee benefits and effective dates in accordance with the California Public Employees Retirement System (CalPERS), California Department of Human Resources (Cal-HR), and State Personnel Board (SPB) regulations. Processes benefits including review of eligibility requirements, completion of forms for health, dental, flex-elect, COBRA, legal services, etc., and keys health enrollment transactions into My- CalPERS, in accordance with the BAM. Update employee health benefit status on the Affordable Care Act System (ACAS).
 - c. Processes suspensions, punitive actions, and stipulations issued as a result of an adverse action.
 - d. Maintains and monitors range changes, MSAs/SISAs, and leave expirations dates for temporary and limited term employees.
 - e. Maintains leave accounting and hours-worked records on intermittent employees. Inputs and reconciles monthly pay for positive pay employees.
 - f. Utilizing applicable references and resources, process benefits including review of eligibility requirements, advises employees, and processes forms for health, dental, flex-elect, COBRA, legal services.
 - g. Completes the most complex, corrections to employee's history in Oracle by using the SharePoint Leave Accrual report and Oracle Load Status Report.
 - h. Process or remove Bay Area, Recruitment, and Bilingual pay, and other pay differentials where applicable.
 - i. Respond to court orders, subpoenas, employee verification requests, and inquiries from other State agencies.
 - j. Utilize applicable HR systems for processing payroll and benefits, downloading and viewing necessary employee documents and/or reports through various systems such as: the SCO (Mobius, CalConnect, etc.), CalHR, and/or CalPERS.

15% Essential

3. **Performs the most complex salary determinations and assists supervisors in review of salary determinations completed by personnel specialists. Provide training, information, and advice as subject matter experts in the areas of personnel and payroll systems Acts as a lead for Personnel Specialists within the unit. Serves as the expert staff resource for difficult and complex personnel/payroll issues. Provides training as needed. Researches, reviews, interprets, analyzes, and applies various laws, rules, regulations, policies, bargaining contracts, and control agency pay letters.**

a. Prepare reports and complete special assignments and projects

- Miscellaneous Incentive Pay
- Maintain and distribute monthly payroll calendar.
- In conjunction with other Senior Personnel Specialists:
- Process OTL corrections and updates through CMS system
- Assist with composing the missing timecard report and post to SharePoint, updating any missing information with supervisor as needed.
- Track and monitor: load status, negative balance, excess/deficit reporting, annual leave/vacation leave conversions, oracle termination and reversals, ACAS compliance, address changes to ensure corrections are made timely.

10% Essential

4. **Act in lead capacity assisting with training new specialist and seasoned staff on payroll and benefits transactions processing as well as new procedures.**

- a. Participate and attend planned training classes pertaining to all Personnel procedures.
- b. Review and implement all revisions to control agency manuals, memos, pay letters, and procedures. Maintains and files warrant registers, pay requests, attendance forms, and official personnel documents
- c. Implements or updates Standard Operating Procedures (SOPs), Job Aids, workflows, and any applicable communication sources

5% Marginal

5. **Assists with the completion of data and responds to research requests for various special projects. Performs other job-related duties as required.**

100%

Required Knowledge Areas:

- Working knowledge of basic math principles.
- Working knowledge of State Fund standard software applications.
- General knowledge of the State Fund organization, Regional Office and Corporate functions.
- Working knowledge of time management techniques to oversee efficient prioritization and completion of work unit tasks for staff and self.

Required Skills and Abilities:

- Ability to handle high pressure situations while being firm but tactful.
- Ability to effectively work with and relate with other people.
- Ability to work independently and as a team with co-workers and management to address and resolve issues.

- Ability to write professional and accurate reports and other communications suitable for distribution to internal and external customers.
- Ability to interpret/apply policies and procedures to complete assignments.
- Ability to achieve results according to objectives.
- Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of “stakeholders”.
- Ability to evaluate information and analyze data to support and defend decisions.
- Ability to manage multiple projects and tasks.
- Ability to provide training.

Work Environment:

Physical Requirements:

- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- Incumbent works in the usual office environment.

Travel:

- Travel may be required.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.

Emergency call backs:

- Not applicable.

Work Hours:

- Standard core business hours.

Supervisor’s Statement: I have discussed the duties of the position with the employee

Supervisor Name (Print):

Supervisor Signature:

Date:

Employee’s Statement: I have discussed with my supervisor the duties of the position and have received a copy

Employee Name (Print):

Employee Signature:

Date: