

DUTY STATEMENT



☒ **CURRENT**
☐ **PROPOSED**

CIVIL SERVICE CLASSIFICATION Analyst II		WORKING TITLE Transactions Operations Analyst		
PROGRAM NAME Office of Administrative Services			UNIT NAME Transactions Support	
ASSIGNED SPECIFIC LOCATION Sacramento			POSITION NUMBER 400 – 107-5393-207	
BARGAINING UNIT R01	WORK WEEK GROUP 2	BILINGUAL POSITION No	CONFLICT OF INTEREST FILER No	BACKGROUND CHECK No

General Statement

Under direction of the Supervisor I, the Analyst II works independently and with minimal supervision to perform the most difficult and complex analytical and technical transaction duties. The incumbent serves as the lead coordinator for various Transactions Operations databases and systems and is responsible for monitoring, reviewing, evaluating, and assessing policies, procedures and processes relating to the HR Transactions Units. The incumbent also participates in developing and conducting training pertaining to Transactions team members, develops departmental memorandums to communicate policy changes from control agencies, and conducts various Transactions audits. Specific duties include, but are not limited to:

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%	System Support Coordination and Project Management: Evaluates, validates, and facilitates record updates and solutions for various Transaction Operations systems. Reviews and responds to employee issues and inquiries, performs evaluations, and implements solutions. Communicates both orally and in writing with departmental employees and program management relating to errors and system updates. Performs data updates and interfaces with control agencies to transfer essential system information, develops and maintains procedural documents and job aids pertaining to the functions of Transactions Operations systems. Establishes, implements, and monitors workload timeframes for Transactions staff in relation to system interfaces and processing. Performs system audits, produces, and disseminates error reports to Transactions team members, and validates updates to ensure accuracy. Independently leads ongoing and special project efforts for the Transactions Unit. Determines objectives, documents tasks and timelines, facilitates group sessions, makes recommendations, reports status in various update meetings for management, and implements project plans. Coordinates and monitors critical program responsibilities in support of the HR Transactions Unit.

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25%	Analysis and Communication of Policies and Procedures: Reviews, evaluates, and assesses policies, procedures and processes relating to the HR Transactions Unit. Researches and analyzes data, memoranda, statutes and regulations from various sources, including control agencies. Develops and prepares correspondence, procedural and informational memos, and reports relating to various transactions subjects for management. Develops and presents new desk procedures, reference materials, and/or job aids/tools related to the HR Transactions Unit. Monitors, reviews, updates, and presents changes to current desk procedures and job aids/tools. Corresponds both orally and in writing with departmental employees, management, control agencies, and the public concerning personnel related issues requiring research into laws, rules, policies, and procedures. Coordinates responses with supervisors and management to ensure all pertinent facts and information is provided.
20%	Training: Develops and maintains fundamental and refresher training course materials for Transaction Roster staff, pertaining to personnel transactions, payroll, benefits, leave accounting, technical system usage and other Human Resources (HR) related subjects. Analyzes and establishes training schedules and course criteria for management's review to be used for staff. Prepares training related materials and job aids and develops assessment tools to be used by Transactions Roster staff as resource materials to complete assignments and tasks related to personnel and payroll related transactions. Schedules and conducts training for Transactions Roster staff by using a variety of methods and tools, such as visual aids, reference materials, and classroom exercises. Develops goals and objectives for each training module and applies course criteria. Conducts staff orientation presentations and demonstrations. Develops and evaluates training needs assessments, course evaluations, and trainee appraisals to make recommendations to supervisors and managers on a routine basis or as requested by management. Coordinates enrollment of staff in technical training provided by the department and control agencies. Interacts with Transactions staff after training to ensure the fundamentals are understood and applied as trained.
10%	Audits: Provides technical and administrative support to Transactions management related to HR programs by providing information to departmental personnel and coordinating with control agencies for resolution related to audit processes and activities. Responsible for developing and initiating procedures in alignment with departmental corrective action plans resulting from business process improvements, enhancements, and audit findings. Conducts internal Transactions related audits and provides Transactions management with the findings and recommendations for corrective action if applicable.
Percentage of Time Spent	Marginal Job Functions
5%	Performs other projects and duties as assigned, including, but not limited to, special HR projects, attending meetings, engaging with multiple levels of management to

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provide reports, representing HR in customer outreach efforts, as well as communicating policy and other information relating to the transaction area, and making recommendations for process improvements.

Conduct, Attendance, and Performance Expectations

The incumbent is expected to adhere to Department policies, rules, and procedures; submit administrative requests including leave, overtime, travel, and training in a timely and appropriate manner; accurately report time; and submit timesheets by the due date.

This position requires the incumbent to maintain consistent and regular attendance; communicate effectively (both 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; and complete assignments in a timely and efficient manner.

Supervision Received

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

Supervision Exercised

None

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

Work Environment

The incumbent works in an air conditioned, low-rise office building with natural and artificial lighting in close proximity to others. The Human Resources Office is a fast-paced work environment in which the incumbent handles confidential and sensitive information.

Special Requirements/Other Information

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.

Physical Abilities

Being in a stationary position and use a computer for long periods of time.

Additional Requirements/Expectations

Failure to effectively perform the duties of the position could result in incorrect or incomplete information dissemination to management and staff and the inability of the department to meet its goals and objectives. Failure to comply with laws, rules, and regulations could result in improper personnel practices that could result in legal action against the department.

Personal Contacts

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The incumbent will have daily contact with all levels of departmental personnel. Further, the incumbent represents the Department with State control agencies, including CalHR, SCO, and SPB. The incumbent will also have direct and frequent interaction with all levels of DIR management including representatives from the Office of the Director and division chiefs. Finally, the incumbent will occasionally interact with applicants, members of the public, and representatives from other state agencies and the Labor and Workforce Development Agency.

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

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

C&S Analyst Initials

Approval Date

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☐ CURRENT
☒ PROPOSED

CIVIL SERVICE CLASSIFICATION Analyst I		WORKING TITLE Transactions Operations Analyst		
PROGRAM NAME Office of Administrative Services			UNIT NAME Transactions Support	
ASSIGNED SPECIFIC LOCATION Sacramento			POSITION NUMBER 400 – 107-5157-XXX	
BARGAINING UNIT R01	WORK WEEK GROUP 2	BILINGUAL POSITION No	CONFLICT OF INTEREST FILER No	BACKGROUND CHECK No

General Statement

Under supervision of the Supervisor I, the Analyst I performs analytical and technical transactions service duties. The incumbent serves as the coordinator for various Transactions Operations databases and systems and is responsible for monitoring, reviewing, evaluating, and updating policies, procedures and processes relating to the HR Transactions Unit. The incumbent also participates in developing and conducting training pertaining to Transactions team members, develops departmental memorandums to communicate policy changes from control agencies, and conducts various Transactions audits. Specific duties include, but are not limited to:

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%	System Support Coordination and Project Management: Evaluates, validates, and facilitates record updates and solutions for various Transaction Operations systems. Reviews and responds to employee issues and inquiries, performs evaluations, submits recommendations, and implements approved solutions. Communicates both orally and in writing with departmental employees and program management relating to errors and system updates. Assists with data updates and interfaces with control agencies to transfer essential system information, develops and maintains procedural documents and job aids pertaining to the functions of Transaction Operations systems. Assists in establishing and implementing workload timeframes for Transactions staff in relation to system interfaces and processing. Assists with performing system audits, produces and disseminates error reports to Transactions team members, and reviews updates for accuracy. Outlines project objectives, documents tasks and timelines, facilitates group sessions, and makes recommendations for management's review. Implements approved project plans and reports status in various update meetings. Coordinates and monitors critical program responsibilities in support of the HR Transaction Operations Unit.
25%	Analysis and Communication of Policies and Procedures: Reviews, evaluates, and assesses policies, procedures and processes relating to

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	the HR Transaction Operations Unit. Researches and analyzes data, memoranda, statutes and regulations from various sources, including control agencies. Develops and prepares correspondence, procedural, and informational memos, and reports relating to various transactions subjects for management. Develops and presents new desk procedures, reference materials, and/or job aids/tools related to the HR Transaction Operations Unit. Monitors, reviews, updates, and presents changes to current desk procedures and job aids/tools. Corresponds both orally and in writing with departmental employees, management, control agencies, and the public concerning personnel related issues requiring research into laws, rules, policies, and procedures. Coordinates responses with supervisors and management to ensure all pertinent facts and information is provided.
20%	Training: Develops and maintains fundamental and refresher training course materials for Transaction Roster staff, pertaining to personnel transactions, payroll, benefits, leave, accounting, technical system usage and other Human Resources (HR) related subjects. Assists in the analysis and establishment of training schedules and course criteria for management's review to be used for new staff. Prepares training related materials and job aids and develops assessment tools to be used by Roster staff as resource materials to complete assignments and tasks related to personnel and payroll related transactions. Facilitates and conducts training for Training Roster staff by using a variety of methods and tools. Develops goals and objectives for each training module and applies course criteria. Conducts staff orientation presentations and demonstrations. Assists in establishing and analyzing trainee expectations as it relates to following established policies and procedures, and assessment requirements and methods. Completes evaluation documents and performs regular assessment activities for trainees. Creates and implements needs assessment studies and makes recommendations to supervisors and managers on a routine basis or as requested by management. Coordinates enrollment of staff in technical training provided by the department and control agencies.
10%	Audits: Provides technical and administrative support to Transactions leadership related to HR programs by providing information to departmental personnel and coordinating with control agencies for resolution related to audit processes and activities. Responsible for developing and initiating procedures in alignment with departmental corrective action plans resulting from business process improvements, enhancements, and audit findings.
Percentage of Time Spent	Marginal Job Functions
5%	Performs other projects and duties as assigned, including, but not limited to, attending meetings, engaging with multiple levels of management to provide reports, representing HR in customer outreach efforts, as well as communicating policy and other information relating to the transaction area, and making recommendations for process improvements.

Conduct, Attendance, and Performance Expectations

This position requires the incumbent to maintain consistent and regular attendance; communicate

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effectively (both 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

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

Supervision Exercised

None

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

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Physical Abilities

Being in a stationary position for long periods of time.

Additional Requirements/Expectations

Failure to effectively perform the duties of the position could result in incorrect or incomplete information dissemination to management and staff and the inability of the department to meet its goals and objectives. Failure to comply with laws, rules, and regulations could result in improper personnel practices that could result in legal action against the department.

Personal Contacts

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Employee Name

Employee Signature

Employee Sign Date

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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.

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Approval Date