

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Personnel Technician I	OFFICE/BRANCH/SECTION District 10 Administration	
WORKING TITLE District Transaction Liaison	POSITION NUMBER 910-001-5160-918	REVISION DATE 08/06/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the supervision of the Branch Chief, a Supervisor I, the District Transactions Liaison (DTL) serves as the liaison for personnel/payroll issues between district office employees and the Division of Human Resources, Office of Transactions Services and Records; disseminates personnel/payroll information and receives and distributes personnel-related documents to designated staff. Provides support to the District staff in the areas of pay, benefits, and examinations. As appropriate, provides assistance or refers employee questions and/or problems pertaining to a variety of personnel-related issues to the Human Resources Division (Headquarters) or the District Human Resources Liaison. The District Transactions Liaison demonstrates a positive attitude, a commitment to providing quality service that is accurate, timely and exceeds our customers' expectations, and maintains complete confidentiality.

CORE COMPETENCIES:

As a Personnel Technician I, 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.

- Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- Reliability**: Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- 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 - Collaboration, Equity, Integrity, Pride)
- Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, Equity, Pride)
- Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Equity, Pride)
- Communication**: Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Employee Excellence - Collaboration, Equity, Pride, Stewardship)
- Planning and Results Oriented**: Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Employee Excellence - Collaboration, Integrity, Pride)
- Thoroughness**: Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

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

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45%	E	Provides support to employees, supervisors, and managers in responding to questions related to benefits, pay and leave balances, retirement, and any other benefit-related personnel matter. Performs the necessary research required to resolve questions on these issues. If necessary, refers technical questions to the Human Resources Division (HQ) or the District Human Resources Liaison. Ensures that all personnel documents (i.e., health, dental, vision, etc.) are completed accurately and submitted to the assigned Personnel Specialist in a timely manner. Assists employees with the completion of necessary forms, answers questions pertaining to forms, benefits, and payroll, and provides information on all benefit-related programs available to State employees.
20%	E	May conduct individual or group new employee orientation (NEO) sessions and notifying union representatives in accordance with Assembly Bill (AB) 119. Review with employees the benefits available to them as State of California employees and provide guidance with the completion of benefit forms.
20%	E	Provides brochures and appropriate forms for various personnel pay and benefit programs. May track a variety of personnel-related documents. Administers I-9 documents on first day of work and collections of new employee forms. May conduct individual and group information sessions relating to various aspects of employment, pay, benefit, retirement, and leave processing procedures.
10%	M	Ensure Human Resources office and equipment, HR Information Centers, and the reception area are adequately stocked with necessary supplies. Ensure the printer/copier machines are maintained. Responsible for receipt and security of confidential information and shredding of confidential documents according to established policies and procedures. Send documents to headquarters that need to be filed in employee's official personnel files.
5%	M	Responsible for the security of a variety of confidential examination-related materials. Assist with the administration of the examination, assist with the Exam Unit and District to secure rooms for conducting written examinations/interviews; respond to general exam questions.

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
This position does not supervise other employees.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
The District Transactions Liaison (DTL) must know basic grammar, spelling, punctuation, and modern English usage. The incumbent must have the ability to interpret and edit written material; write effectively; analyze written and numerical data accurately, and follow oral and written instructions. In addition, they must have the ability to express ideas in a clear, concise manner either orally or in writing. Knowledge of various personnel-related principles and practices, and examination policies and procedures is essential. The incumbent must possess the ability to accept increasing responsibility and complete all tasks/ assignments accurately and thoroughly; develop and maintain cooperative working relationships with all levels of staff; and be able to apply a plan of action in evaluating situations. The incumbent should have basic computer skills and be familiar with the Internet. The DTL must maintain confidentiality, skillfully organize and maintain different types of information, accurately manage multiple tasks, and handle time-sensitive material within designated time frames. As a member of the Division of Human Resources (DHR), all employees are expected to remain flexible and be willing to adjust work schedules as needed in order to meet operational needs.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
The DTL, under the supervision of the Supervisor I, is responsible for communicating accurate information to employees regarding pay and benefits, as well as assisting them with submitting documents. Erroneous information and/or untimely submission of documents could result in the loss and/or delay of an employee's pay and/or benefits. Failure to provide proper information to employees could result in financial liability and/or discredit to the department and division. The DTL must ensure that accurate and timely information is communicated at all times to district employees so that they can make informed decisions regarding their pay and benefits. Erroneous decision-making in the examination process could result in compromising the integrity of the exam, as well as create a financial liability and/or discredit to the department and division. 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 employees' confidential information may damage the Division of Human Resources (DHR) 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 Transactions Liaison has daily contact with all levels of employees and the public, and is expected to exercise tact, discretion, and excellent communication and customer service skills.

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to sit for long periods of time using a keyboard and video display terminal. May also be required to move medium size boxes of material and packages from one location to another. This position requires patience and understanding when dealing with a high volume of requests from a diverse group of people. Must also deal with many cut-offs/ deadlines and interruptions while maintaining excellent customer service. Will be involved with sustained mental activity needed for analysis, reasoning, and problem solving. The Transaction Liaison must have the ability to multi-task, adapt to changing priorities and complete tasks or projects on short notice. The workload is subject to frequent, substantial, and unexpected changes within a short time period. Requires ability to resolve emotionally charged issues reasonable and diplomatically. The incumbent must have the ability to develop and maintain cooperative working relationships, respond appropriately to difficult situations; recognize emotionally charged issues or problems and acknowledge the various responses. Must have the ability to apply sound judgment in problem solving; be a self-starter. Must be able to create a work environment that encourages creative thinking and innovation. May also be required to speak in front of large groups or represent the department at various meetings.

WORK ENVIRONMENT

The employee will work in a climate-controlled office under artificial lighting. May occasionally be required to travel when conducting exam duties, when attending training, when attending liaison meetings in Sacramento, and when assisting with new employee paperwork at other locations. Must comply with all Personal Protective Equipment and safety policies/requirements while in state facilities, driving state vehicles, or on state right-of-way.

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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