



Duty Statement

Classification: **Analyst I**

Position Number: **275-440-5157-036**

HCM#: **3440**

Branch/Section: **Disability & Survivor Benefits Division / Disability Retirement Section / Disability Retirement Processing & Appeals**

Location: **Sacramento, CA**

Working Title: **Disability Retirement Analyst I**

Effective Date: **January 1, 2026**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: ☐ Yes ☒ No

Telework: ☒ **Office-Centered** ☐ **Remote-Centered** ☐ **Not Eligible**

The Disability & Survivor Benefit Division (DSBD) provides benefits and information to members, retirees, beneficiaries, and survivors. Monthly benefit payments exceed \$1 billion to over 548,000 annuitants.

The Disability Retirement Section is primarily responsible for reviewing CalPERS member applications for Disability/Industrial Disability Retirement by gathering necessary medical and legal documentation and adjudicating applications in a timely and accurate manner.

Under supervision of the Supervisor I in the Disability Retirement Section, the Analyst I performs the following duties and responsibilities:

Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

45% Onsite¹ and virtually, review, analyze, evaluate, and determine state, local miscellaneous, schools and state safety and industrial members' eligibility for DR and IDR benefits. Analyze and resolve DR/IDR issues through the review of job descriptions and medical documents from various sources, determine the need for additional information from appropriate source(s), and identify the necessity for an Independent Medical Examination (IME) and/or Job Assessment. Interpret medical reports using knowledge and familiarity of general medical terms, diseases, and conditions and apply this knowledge to the Public Employee Retirement Law (PERL) and court decisions regarding testing of "substantial incapacity for the

performance of duties" in order to make a determination of DR/IDR eligibility. Summarize the case worksheets medical and vocational information to clearly support the conclusion and recommendation of approval or denial of DR/IDR benefits. For the denial of benefits, provide written recommendations to the Section Leader and Division Chief for concurrence. Provide written notice of the decision to member and employer.

- 20% Onsite and virtually, analyze cases to identify reason for separation of employment and if case law for Haywood exists by gathering initial information from employers and members or retirees. Once established, prepare case worksheet for transfer to the analyst II level. Detect potential indicators of fraudulent claims and notify the Disability Validation Team when such indicators are identified. Make determinations on IDR cases regarding the industrial nature of a member's disabling condition by reviewing and analyzing input from State Compensation Insurance Fund, Workers' Compensation, and other sources. Approve members for DR or IDR benefits in myCalPERS system or determine the need for resolution by the Workers' Compensation Appeals Board and provide written notification to the member.
- 20% Onsite and virtually, process new and renewal applications for independent medical examiners through vendor medical groups and private practice. Using procedures, ensure all documents are reviewed for eligibility and licenses are current, enter into myCalPERS.
- 10% Onsite and virtually, independently respond both verbally and in writing to inquiries from members, employers, physicians, job assessors, attorneys, legislators, and employee representatives by providing information, requesting documentation, and explaining case status or next steps in accordance with established laws, policies, and procedures. Respond to written and/or verbal correspondence and complete required follow-up actions in alignment with departmental procedures and time frames.
- 5% Onsite and virtually, participate in regularly scheduled meetings, such as one-on-one meetings with team leader, team meetings, and section meetings. Attend required trainings, including new procedure, refresher, and medical trainings. Actively engage in all meetings, including taking notes and following up on assigned action items as applicable. Participate in special projects and group activities related to disability and industrial disability retirement. Complete CalPERS mandatory training in accordance with departmental procedures and established timeframes. Perform other duties as assigned that are appropriate for this classification.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance).
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

Employee Name (Print):

Employee Signature:_____ **Date:**

I certify that the above accurately represents the duties of the position.

Supervisor Signature:_____ **Date:**