



Duty Statement

Classification: **Analyst II**

Position Number: **275-440-5393-065**

HCM#: **2758**

Branch/Section: **Disability & Survivor Benefits Division / Survivor Benefits Section / Post Retirement Survivor Benefit**

Location: **Sacramento, CA**

Working Title: **Post Retirement Survivor Benefits Analyst II**

Effective Date: **August 27, 2026**

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

Supervision Exercised: ☐ Yes ☒ No

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

The Disability & Survivor Benefits Division (DSBD) provides benefits and information to members, retirees, beneficiaries, and survivors. The Post-Retirement Survivor Benefits Section is a high-volume production unit that pays post-retirement survivor benefits, and researches and resolves the most complex survivor benefit cases.

Under direction of the Supervisor I in the Post Retirement Survivor Benefit Processing Unit, the Analyst II 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, monitor and manage workload utilizing the internal myCalPERS system. Enter claimant information, payment address, and tax elections into the myCalPERS system. Complete routine and complex lump sum and monthly calculations for the benefit payments through the myCalPERS system using Post-Retirement Survivor Benefit program's established policies and procedures. Review and audit system calculations in myCalPERS to verify accuracy and completeness for death benefits payable. Release benefit payments to beneficiaries and survivors for lump sum and monthly death benefits. Prepare lump sum and monthly manual calculation of death benefits utilizing myCalPERS and Microsoft Excel.

- 35% Onsite and virtually, complete complex manual calculations and process adjustments for benefit payments resulting from record audits using the myCalPERS system and Post-Retirement Survivor Benefit program's established policies and procedures. Complete complex reviews to determine beneficiary eligibility, analyze documentation for qualification purposes, and compose both customized and templated letters to notify individuals of their eligibility status and request any necessary additional information.
- 15% Onsite and virtually, respond to telephone calls and correspondence concerning death benefits by independently analyzing eligibility, documentation requirements, case status, and system records, and by providing guidance on resolution and next steps. Identify and route misrouted inquiries to the appropriate workflow queue through the myCalPERS system. Request expedited processing or convert case to A Spousal Accelerated Payment (ASAP) to prioritize review and payment for survivors. Review complex survivor benefit issues and make recommendations for resolution and procedure changes to unit leader and provide mentoring to team members on the proper handling of the issue.
- Onsite and virtually, participate as division representative on major inter-division or inter-departmental special projects and complex case workload requiring in-depth knowledge of Post-Retirement Survivor Benefit processes, benefits system operations, legislation, tax-reporting implications, COLA/PPPA, and other related knowledge.
- Onsite and virtually, analyze deceased member, beneficiary, or community property payee records to determine what benefits are payable and identify the eligible beneficiary(ies). Apply the Public Employee Retirement Law (PERL), Post-Retirement Survivor Benefit policies, and procedures to make an accurate determination of benefit entitlement for beneficiaries and survivors. Determine documents needed to establish entitlement, including return of payments issued after death. Contact beneficiaries, survivors, and other third parties by phone or mail to request additional documents and send follow up letters to related participants. Review the deceased member, beneficiary, or community property payee record to determine if the deceased member's retirement allowance requires an adjustment before death benefits can be paid. Analyze data, identify errors, and make corrections to participant accounts in the myCalPERS system.
- 5% Onsite and virtually, prepare responses to non-routine correspondence, including letters requiring careful application of law, policy, and case history, for review and signature by the section leader, division chief, or executive team members.
- Onsite and virtually, provide analysis and recommendations to the unit leader on complex issues involving program automation and technical support related to special projects, legislative changes, integrated system, and customer acceptance testing, business process reengineering, and system application enhancements, service and problem requests, and change control items.
- Onsite and virtually, attend regularly scheduled meetings and required trainings. Perform other duties as assigned and 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:**