



Duty Statement

Classification: **Office Technician (Typing)**

Position Number: **275-713-1139-003**

HCM#: **2942**

Branch/Section: **Customer Services & Support Branch / Member Account Management Division / Service Credit Purchase & Elections Section / Costing, Elections, & Account Reviews / Costing & Elections Team 1**

Location: **Sacramento, CA**

Working Title: **Service Credit Processing Technician**

Effective Date: **October 1, 2026**

Collective Bargaining Identifier (CBID): **R04**

Supervision Exercised: ☐ Yes ☒ No

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

The Member Account Management Division (MAMD) administers the Service Credit Purchase & Elections (SCPE) Program. Services include assisting with requests and elections for purchasing service credit, providing refunds of member contributions, and conducting in-depth research and analysis of member accounts to address potential service credit accrual discrepancies. The division also provides a wide range of administrative support to six divisions in the Customer Services & Support (CSS) Branch. In this capacity, the Branch Administrative Services Section (BASS) coordinates human resources support for approximately 900 team members, oversight of the \$121 million branch budget, and data collecting and reporting of CalPERS CSS Customer Service metrics.

Under the general direction of the Supervisor I of the Costing and Elections team, the Office Technician (Typing) provides clerical and administrative support for the Costing and Elections Team. The position prepares, sorts, tracks, and distributes documents; maintains schedules and basic records; gathers and enters operational information; and supports internal coordination and member-facing activities. The work requires regular use of office systems, spreadsheets, and document-handling procedures in a team-based environment.

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.

40% Onsite¹ and virtually, monitors assigned workflow queues to identify duplicate requests, reviews each request to ensure accuracy and completeness using established procedures, and re-associates or re-routes documents to the appropriate queues or program areas according to established procedures. Routes workflows from designated queues to team members based on the assignment log and established procedures. Answers general telephone and workflow inquiries and documents participant interactions and actions taken in myCalPERS participant notes. Escalates workflow items that meet escalation criteria to designated team members by re-routing the item or notifying the team leader. Provides clerical support by completing basic research, obtaining documents from myCalPERS, responding to follow-up requests, preparing rollover-related documents, monitoring unit email inboxes, and answering telephones. Uses tools such as myCalPERS, microfiche, and microfilm to obtain additional documents and associate them with the appropriate participant record according to procedures.

Onsite and virtually, processes and sorts incoming and returned mail, workflow inquiries and requests, faxes, and document volumes as directed by team leader. For returned mail items with no forwarding information, Researches participants' address information using external databases, such as Accurant and Berwyn, and records updated address information in myCalPERS following established security protocols. Reviews workflow queues to identify and close duplicate workflow requests according to established criteria. Informs leadership when mail items and inquiries require immediate escalation. Copies and distributes correspondence and other documents to designated team members or program areas.

25% Onsite and virtually, reviews, validates, and processes less complex and routine Service Credit Purchase and Elections section requests, applications, elections, and calculations received through workflow or mail, and completes required processing steps in accordance with the California Public Employees' Retirement Law. Checks participant-submitted documents and system-generated data for accuracy and completeness using myCalPERS and manual review procedures and records any discrepancies for follow-up. Reviews information from participants, business partners, other retirement systems, and third-party vendors, including costing requests, election packets, basic election processing, payment history counts, money transfer, tax-deferred balance dues, taxed balance dues, verification of refunds, and refund payment processing, using CalPERS systems, policies, and procedures. Reviews participant accounts, employment records, payroll history records, and business partner contracts to verify whether service credit purchase eligibility criteria are met. Verifies calculation output and election processing and applies cash and electronic fund transfer payments to service credit purchase records. Prepares correspondence such as confirmation letters, authorization documents, election packets, payment confirmations, and schedule

changes, for participants, business partners, and other retirement systems using Microsoft Office programs.

- 20% Onsite and virtually, reviews, validates, and processes requests, applications, election forms, and insufficient funds transactions related to service credit purchase records. Utilizes CalPERS tools and resources to confirm submitted documentation is complete and sufficient and to reconcile service credit purchase records and receivables by comparing submitted documents with system data. Assists in the preparation of and documenting operational practices and procedures using Microsoft Office applications. Provides chronological summaries of participant and business partner information to assist the team lead and team members in developing proposals and recommendations for leadership review.
- 10% Onsite and virtually, verifies workflow requests have been closed and checks participant accounts in myCalPERS to ensure required notes and updates documenting completed actions have been entered. Advises leadership when these steps are not complete to ensure adherence to processing time frames and identify training opportunities. As assigned, prepares documents for post process scanning into the myCalPERS Document History by removing staples, clips, taping tears, and holes, and sorting them by category type. Inserts separator sheets between participant and business partner documents and sort them into batches. Prepares work schedules that track volume and completion time for assigned tasks. Collects and records system issues and statistical information in Excel for review by the team lead.
- 5% Onsite and virtually, receives documents from other program areas through mail, workflow, or internal delivery, and delivers or routes the documents to designated team members or queues according to procedures. Performs 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.
- On a rotational basis, all employees will be required to provide telephone coverage and assistance during normal office hours of 8:00 a.m. to 5:00 p.m.
- Assist with and participate in the coordination and delivery of CalPERS Benefit Education Events, which requires travel throughout California, including overnight stays.

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 represent the duties of the position.

Supervisor Signature:_____ **Date:**