

Department of Consumer Affairs

Position Duty Statement

HR-041 (07/2015)

Classification Title Personnel Specialist	Board/Bureau/Division Administration
Working Title Transactions Personnel Specialist	Office/Unit/Section / Geographic Location Office of Human Resources / Personnel Transactions Unit / Sacramento
Position Number 610-740-1303-XXX	Name and Effective Date

General Statement: Under general supervision of the Transactions Manager, the Personnel Specialist (PS) is responsible for performing all aspects of personnel transactions including but not limited to payroll, time and attendance reporting, appointments, and separations. The incumbent independently processes various complex and sensitive personnel transactions accurately in compliance with applicable bargaining unit contract/Memorandum of Understanding (MOU) language, departmental policies and procedures, and Department of Human Resources (CalHR), State Personnel Board (SPB), and State Controller's Office (SCO) laws and rules while meeting management and clients' expectations. Duties include, but are not limited to, the following:

A. SPECIFIC ACTIVITIES [Essential (E) / Marginal (M) Functions]

30% (E) APPOINTMENTS/SEPARATIONS

- Reviews appointment documents for accuracy and completeness pertaining to new hires, transfers, and reinstatements and obtains missing documents from clients. Utilize and completes appropriate corresponding checklist to ensure all steps are completed.
- Identifies required internal and external clearances and obtains all approvals necessary to complete the hiring process.
- Requests Official Personnel File (OPF) from transferring department for employees transferring to the Department of Consumer Affairs (DCA); creates an OPF for new-to-state hires with appropriate file tabs; and organizes OPF with new hire documents in accordance with established guidelines.
- Prepares Form 612 (PAR) and OPF for transfer of employees to other departments/reporting units; reviews employment and pay history to ensure that the information is correct prior to sending files; purges documents in the OPF in accordance with established guidelines.
- Review separations and processes forms appropriately; works closely with Cashiering and Accounting to ensure all clearances are obtained before an employee separates from the Department; processes lump sum deferral forms accurately and timely; follows established procedures when informed of a deceased employee.
- Calculates appropriate salary determinations by applying the appropriate salary rules for all appointment transactions.

25% (E) MISCELLANEOUS TRANSACTION FUNCTIONS

- Reads, implements, and maintains various manuals [e.g., Personnel Action Manual (PAM), Payroll Procedures Manual (PPM), Benefits Administration Manual (BAM), etc.] to ensure information is current. Interprets revisions, memos, and procedures and applies information accordingly.
- Reviews and implements directives received from control agencies (SCO, SPB, CalHR, CalPERS, EDD) via Pay Letters, Payroll Letters, Personnel Letters, Circular Letters, etc.
- Researches and resolves pay issues by establishing, collecting, monitoring, and satisfying accounts receivables (A/R) including providing notifications to employees. Processes and tracks wage garnishments pertaining to child support, spousal support, student loans, etc.
- Calculate and processes payroll transactions for salary advances, overtime, out-of-class, special pay differentials, military, and holiday pay to accurately compensate employees. Researches and resolves pay discrepancies.
- Records addition, deletion, and/or omissions to monthly attendance reports (STD. 672).
- Researches and evaluates personnel transactions as requested by the supervisor and makes appropriate recommendations verbally and/or in writing.
- Performs miscellaneous activities on behalf of employees, such as providing verbal and written employment verification.
- Prepares clear and concise memoranda/letters to employees, clients, and control agencies to explain actions, request approvals, or provide information.
- Maintains leave accounting and hours-worked records on part-time, intermittent, and retired annuitant employees. Notifies DCA programs when employees are near the allowed maximum hours/days worked in accordance with established guidelines.
- Consults with program staff to discuss and/or resolve all transaction related matters.

20% (E) AUDITS

- Reviews and reconciles attendance reports to monthly payroll warrant registers; audits leave usage; researches and resolves discrepancies; makes corrections to CLAS data base to ensure accuracy. Reconciles and certifies payroll monthly. Reviews PAR and payroll documents to ensure accuracy.
- Tracks range change eligibility, limited-term expirations dates, special in-grade salary adjustments (SISA), special pay differentials, CalPERS eligibility, employee returns, Notice of Personnel Action (NOPA) forms, intermittent hours, probation report due dates and prepares documents, keys transactions and/or notifies clients of eligibility. Notifies the Performance Management Consultant if negative information is contained on Probationary Reports or if MSA/SISA denials are received.
- Monitors personnel and payroll actions to ensure critical personnel transaction due dates are met.

- Reconciles leave balance reports with time sheets each month to ensure each employee's leave balance information is current and accurate. Completes Leave Activity and Correction Certifications each month to document monthly audit of leave used and accrued.
- Review monthly retroactivity report and identify items to dispute and the program responsible for valid charges in accordance with established guidelines.

20% (E) DATA ENTRY

- Enters employee information, leave data, and payroll actions into the appropriate automated database application (PIP, HIST, PIMS, CLAS).
- Processes Employee Action Request (EAR) forms (and separation EARs) and updates employee records to maintain accurate address and tax withholding information.
- Maintains accurate employment history in accordance with the PAM and control agency directives.

5% (M) BENEFITS

- Assist with special projects.

B. Supervision Received

The PS reports directly to and receives the majority of assignments from the Transactions Manager; however, direction and assignments may also come from the other Transactions Manager, Section Chiefs, or the Human Resources Chief.

C. Supervision Exercised

None

D. Administrative Responsibility

None

E. Personal Contacts

The PS has frequent contact with a variety of control agencies (SCO, SPB, CalHR, CalPERS, EDD) to discuss and resolve issues; frequent contact with departmental and board management and staff to discuss issues; and daily contact with the Office of Human Resources (OHR) management and staff.

F. Actions and Consequences

Mistakes in appointment, payroll, or separation transactions could have a severely negative effect on employees and may result in late payments, incurring substantial penalty fees, loss of delegation, and discredit to OHR.

G. Functional Requirements

No specific physical requirements are present: the incumbent works 40 hours per week in an office setting, with artificial light and temperature control. Ability to

use a personal computer and telephone is essential, as the majority (90%) of the work is performed using a personal computer and telephone. Occasional (<5%) stooping or bending to access files. Computer usage is frequent or repetitive.

H. Other Information

The PS must be knowledgeable of: personnel management policies, procedures, practices, and processes relating to personnel transactions; control agency functions and procedures; laws, rules, and regulations regarding civil service, exempt, and CEA appointments and separations; state benefits and disability administration; and collective bargaining agreements; and possess the ability to: interpret directives or information from various control agencies; interpret and apply laws, rules, regulations, bargaining unit contract, and policy memoranda related to personnel transactions.

Incumbent must: possess good communication skills, use sound judgment in decision-making, exercise creativity and flexibility in problem resolution, manage time and resources effectively, and be responsive to DCA management and client needs.

The PS represents OHR in all interactions with all levels of DCA staff and outside agencies. As a member of the OHR team the incumbent is expected to work cooperatively with all levels of staff and management and to provide excellent customer service to DCA employees, and to remain professional at all times. To accomplish OHR goals, the incumbent is expected to exhibit flexibility in accepting additional responsibilities, work as part of a team and provide enthusiastic support for their co-workers when necessary, exercise discretion and confidentiality, safeguard personal identifiable information, and conduct themselves in a pleasant, helpful, and highly professional manner in all interactions with DCA staff and visitors to OHR.

In all job functions, employees are responsible for creating an inclusive, safe, and secure work environment that values diverse cultures, perspectives, and experiences, and is free from discrimination. Employees are expected to provide all members of the public equitable services and treatment, collaborate with underserved communities and tribal governments, and work toward improving outcomes for all Californians.

Experienced Specialists (Range C and D) may provide functional guidance to new Specialists (Range A and B).

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety analyst.)

Employee Signature

Date

Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Printed Name

New: 06/2026