



Duty Statement

Classification: **Analyst II**

Position Number: **275-190-5393-016**

HCM#: **4338** **JC-531878**

Branch/Section: **Customer Services & Support Branch/Customer Experience Division/CalPERS
Contact Center – Member Team 4**

Location: **Sacramento, CA**

Working Title: **Contact Center Associate**

Effective Date: **September 10, 2026**

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

Supervision Exercised: ☐ **Yes** ☒ **No**

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

The CalPERS Contact Center is the first point of contact for CalPERS customers, providing customer services and education by phone and correspondence concerning retirement and health benefits, applying the Public Employees' Retirement Law (PERL), Public Employees' Medical and Hospital Care Act (PEMHCA), applicable regulations, new legislation, and policy initiatives.

Under the direction of the Supervisor I, the Analyst II independently performs varied and complex analytical duties to support the customer service goals and objectives of the Customer Experience Division (CXD) and CalPERS. The position serves as a lead resource for escalated customer issues, providing analytical assistance, training, and guidance to Contact Center agents and resolving inquiries that require interpretation of the PERL, PEMHCA, and related statutes, regulations, and policies. Working within the CalPERS Contact Center, the incumbent researches and resolves complex retirement and health benefit questions, prepares written responses, and contributes to process improvements, policy updates, and training needs identified through call trends. The position operates with a high degree of independence in analyzing issues, documenting outcomes, and ensuring customers receive accurate, timely, and comprehensive information across all CalPERS program areas.

Essential Functions

Remote-centered team members will be required to come into Sacramento Headquarters or their assigned Regional Office location on a routine, regular basis for instances including, but not limited to, attending CalPERS business-related meetings, picking-up and/or dropping-off of office equipment or work materials/product, attending training, and obtaining general office supplies or when your specific position requires work to be performed onsite.

40% Onsite¹ and virtually, serves as a lead resource on our Internal Agent Assistance (IAA) line, providing analytical assistance, training, and guidance to Contact Center agents during call escalations by reviewing the issue, identifying applicable statutes or policies, and recommending resolution steps to the agent or intervening directly when needed. Upon

receiving an escalated call, review the issue with the initial agent and recommend next steps, or assume control of the call to explain applicable rules and resolve the customer's inquiry. In response to all inquiries, analyze and interpret the PERL and PEMHCA, and the execution of CalPERS statutes, laws, rules, regulations, policies, and procedures to determine correct responses to customer inquiries and document the resolution in the myCalPERS system. Research and resolve inquiries that require additional review (e.g., retirement and health issues) by gathering information from myCalPERS and related systems, evaluating applicable rules, and preparing a complete response for the customer. Resolve problems and issues that require extended review by analyzing account history, verifying documentation, and determining the correct action under applicable laws and policies. Evaluate escalated issues to determine whether they need to be referred to an appropriate division for a more thorough response using established referral procedures. Utilize myCalPERS and all related Contact Center systems to deliver accurate and timely information to both customers and unit leaders. Document call outcomes and actions taken in myCalPERS and related systems using required templates and data fields. Perform all aspects of customer assistance, data entry, and documentation in strict compliance with established performance standards and the Division's Quality Assurance guidelines, typing at a speed and level of accuracy that consistently meets or exceeds these standards to support efficient, high-quality service delivery.

35% Onsite and virtually, serve as the initial point of contact by answering customers inquiries and providing information to active and retired members, employers, beneficiaries, and the general public regarding CalPERS retirement benefits and health programs via telephone, the Secure Message portal of the myCalPERS system, or workflow processes, in accordance with applicable statutes, policies, and procedures. In response to inquiries at all levels of complexity, analyze and interpret applicable CalPERS statutes, laws, rules, regulations, policies, and procedures to determine correct responses and actions for customer inquiries. Provide customers with information and assist them in navigating and creating accounts in the myCalPERS system for all services provided by CalPERS, including but not limited to, completing complex health and retirement transactions, purchasing service credit, processing death benefits, selecting retirement allowance options, addressing community property matters, resolving payroll issues, answering membership questions, and handling employer contracts by explaining the required steps and verifying the information entered; provide information on health and dental enrollment and eligibility, clearly explain membership eligibility criteria, adjustment processes, and contract and payroll requirements, as needed. Perform all aspects of customer assistance, data entry, and documentation in strict compliance with established performance standards and the Division's Quality Assurance guidelines, typing at a speed and level of accuracy that consistently meets or exceeds these standards to support efficient, high-quality service delivery.

10% Onsite and virtually, through fax, TTY machine, and letters, prepare written responses to customer inquiries using division approved templates and document the correspondence in the appropriate system. Communicate with customers regarding issues referred by CXD leadership, or division units by explaining applicable rules, outlining next steps, and documenting the interaction. Stay apprised of changes or updates to Division or Enterprise policies or procedures by performing a daily review of Contact Center News Network for

changes to processes, procedures, or upcoming system changes. Attend meetings and trainings as assigned.

10% Onsite and virtually, analyze escalated call data to identify trends and training needs and prepare recommendations for leadership review.

5% Onsite and virtually, draft or review policies, procedures, and external communications related to Contact Center operations by analyzing proposed changes and preparing recommendations for leadership. Collect and analyze operational data, participate on project teams, and prepare recommendations for leadership to improve processes and customer service. Perform other duties as assigned and appropriate for this classification.

Knowledge, Skills and Abilities

Knowledge of: Principles, practices, and trends of public and business administration, management, supportive staff services, and governmental functions and organization, and methods and techniques of effective communication and leadership.

Skill in:

- Organization and time management.
- Experience in call center or customer service environments.
- Detail orientation.
- Basic computer skills and software application use.
- Implementing management direction and conclusions.
- Ability to communicate clearly with customers and respond to inquiries using established procedures.
- Applying and interpreting PERL and PEMHCA rules and regulations, departmental policies and procedures, and related statutes, laws, rules, regulations.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work; and coordinate the work of others, act as a team leader, and appear before legislative or other committees.

Working Conditions

- ¹ This position is designated as remote-centered and works primarily at their designated alternate work location.
- Continuous interactions with customers via the telephone.
- Use of a computer mouse and intermittent keyboarding to accomplish certain tasks within specified timeframes is required.
- Being stationary, being upright, and phone requirements consistent with Contact Center work.
- Wired headsets to allow for mobility while working.
- Expected to accomplish tasks within strict timeframes to meet Key Performance Indicators.
- Office setting with artificial light and temperature control (applicable only if working onsite).

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to meet performance expectations.
- 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:**