

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION Human Resources/Transaction Services	
WORKING TITLE Transactions Analyst	POSITION NUMBER 702-008-	REVISION DATE 09/22/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the general direction of the Supervisor I the incumbent provides administrative, training and analytical support for the Office of Transactions Services. The Analyst II demonstrates a positive attitude and a commitment to providing quality service that is accurate, timely, and exceeds our customers' expectations.

CORE COMPETENCIES:

As an Analyst II , the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Employee Excellence - People First)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - People First)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Employee Excellence - People First)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Employee Excellence - People First)
- **Interpersonal Savvy/Partnering:** Builds constructive and effective relationships, using diplomacy and tact. Is able to relate to a diverse set of individuals. (Employee Excellence - People First)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Employee Excellence - People First)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Employee Excellence - People First)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - People First)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Employee Excellence - People First)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

POSITION DUTY STATEMENT

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35%	E	Completes and calculates basic and advanced salary determinations, which may include incorporation and review of applicable Alternate Range Criteria, depending on the type of classification. Reviews, analyzes, and interprets all applicable salary laws, rules, and regulations to determine which salary regulation applies to applicable appointment. Ensures classifications mentioned in Section 5 Pay Scale are factored into the salary determination to ensure its accuracy. Applies appropriate regulation to ensure compliance with the California Code of Regulations (CCR). Stays abreast of ever-changing California Department of Human Resources (CalHR) and State Controller's Office (SCO) policies and procedures. Analyzes and interprets new, existing, and modified policies and regulations to determine whether there will or may be an impact to the Department. Using the SCO Legacy System and the Civil Service Exempt Pay Scale view, as needed, review applicable SCO and CalHR pay letters based on classification to reconstruct salaries and determine whether individuals meet the appropriate criteria in line with CCR Section 599.677, by analyzing the thresholds and criteria. Upon completion of review, calculate and determine best benefit for applicant as applicable. If necessary and requires CalHR approval, work with management to obtain these approvals.
20%	E	Independently constructs MIRS reports to extract personnel information from the State Controller's Office System. Generates reports using the MIRS Common Library with our internal Staff Central timekeeping system and writes custom reports using FOCUS language. Analyzes information to determine whether to use current position, employment history, payment, deduction, current leave benefit, leave transactional history data, or position data when report writing. Generates, executes, prints and downloads reports. Reviews, edits and monitors the MIRS Reoccurring Report listing to ensure report and recipient accuracy.
15%	E	Independently formats and enhances raw MIRS data to create professional documents and Excel client facing reports. Creates workbooks and ensures accuracy of data. Properly labels headers, footers tabs, and footnotes. Saves reports in designated network folder and labels according to standards. Drafts professional client-facing emails and disseminates data and reports to the correct recipients. Uses Excel formulas to compile and complete summary data. Ensures the proper and allowable dissemination of data that incorporates sensitive information such as, social security numbers, ethnicity and gender.
10%	E	Analyze, monitor, and validate personnel and payroll documents processed by OTS to ensure accuracy and compliance with SCO, CalPERS, CalHR, SPB, and DOF requirements. Review Personnel Action Requests (PARs), Employee Action Requests (EARs), PARFs, health and benefit forms, employment history records, garnishments, accounts receivable, and salary advances. Support staff by providing technical guidance on resolving complex transaction errors, adjusting entries, interpreting system messages, navigating CLAS/LAB errors, and updating SCO history. Collaborate with control agencies to resolve discrepancies and obtain clarification on technical issues. Maintain positive working relationships with all control agencies to support issue resolution and ensure consistent application of statewide policies.
5%	E	Researches and prepares responses to Labor Relations timely regarding inquiries and/or grievances, maintaining log and completing file, taking appropriate corrective actions as necessary, and attending bi-monthly meetings reporting on status. Assists Transactions staff in dealing with intricate personnel issues (i.e. SPB lawsuits or penalty and interest lawsuits). Personally performs the most complex duties and makes recommendations to management on corrective measures.
5%	E	Participates on special projects and workgroups, and assist in completing special projects as directed. Assists in researching past practices and policies and evaluate projects to ensure departmental mission and goals are met.
5%	M	Lead in the development and publication of the bi-weekly "What's New" newsletter for OTS Curate content, verify accuracy, organize layout, determine relevance, and ensure timely posting to the DHR website. Maintain a publication rotation, manage version control, and track what content needs follow-up in future editions. Assist management in preparing additional HR bulletins or newsletters as needed.

POSITION DUTY STATEMENT

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5%	M	Lead in the development and publication of various Personnel and Management Information Bulletins (PIBs & MIBs) and curate content, verify accuracy, organize layout, determine relevance, and ensure timely posting to the DHR website. Maintain a publication rotation, manage version control, and track what content needs follow-up in future editions. Assist management in preparing additional HR bulletins or newsletters as needed.
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¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.
MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
None. May act as a lead analyst on various training and policy duties, assignments and projects.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Incumbent must be able to perform professional level analytical work with a high degree of complexity to resolve administrative problems and make recommendations for an effective course of action. The incumbent must reason logically and creatively, consult and advise on a variety of subject matters and demonstrate a capacity for assuming increasing administrative responsibility. Must grasp the essence of new information and master new technical and business knowledge. Must adjust rapidly to new situations warranting attention and resolution. Knowledge of SPB and CalHR laws, rules, policies, and practices; SCO's automated payroll system, Caltrans' automated time reporting system (Staff Central); and the California Leave Accounting System (CLAS).
Ability to effectively interpret civil service laws and rules and various personnel manuals from SCO, CalPERS and CalHR, as well as departmental procedures and Memorandum of Understandings (MOUs). Must have skills and ability to use computers to perform word processing, develop spreadsheets, create pivot tables, perform mail merge, develop newsletters, update documents to fill-in-fields, create and update databases, including Microsoft Word, Microsoft Excel, Microsoft Publisher, Adobe Acrobat Pro, FileMaker Pro, Microsoft Teams, and WebEx. Ability to speak and write effectively; analyze situations accurately and take effective action.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
The incumbent is responsible for effectively planning, coordinating, and executing office policy and procedures as they relate to the Office of Transactions Services. Poor judgment in monitoring, evaluating and reporting information could affect staff's ability to effectively provide quality personnel and payroll-related services to internal and external customers. The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employee's confidential information may damage DHR's reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

PUBLIC AND INTERNAL CONTACTS
The incumbent will work with Caltrans OTS staff and all levels of Caltrans staff, management, consultants, private sector groups and representatives of control agencies. Must work with others in a cooperative manner and demonstrate a positive attitude.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Incumbent may be required to sit for long periods of time using a keyboard and monitor, and may be required to lift, carry, and move boxes of material from one location to another. Will occasionally be required to bend, stoop and kneel; pull, push or grasp objects; stand for long periods of time, and twist the body or neck in a sideways motion, either seated or standing. Incumbent must sustain concentration level needed for reviewing material, auditing, problem solving and reasoning, and must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Incumbent may deal with difficult people and must have the ability to develop and maintain cooperative working relationships; resolve emotionally charged issues reasonably and diplomatically; consider and respond appropriately to the needs, feelings, and capabilities of different people in different situations; be tactful and treat others with respect.

WORK ENVIRONMENT
While at their base of operation, incumbent will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate.
This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs.

POSITION DUTY STATEMENT

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Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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