

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Personnel Technician I	OFFICE/BRANCH/SECTION D5/Admin/Organization & Position Management	
WORKING TITLE Transactions Liaison	POSITION NUMBER 905-001-5160-006	REVISION DATE 09/25/2026

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

GENERAL STATEMENT:

Under the supervision of the Organization and Position Manager; acts as the liaison for personnel/payroll issues between District employees and Headquarters Transactions; disseminates personnel/payroll information and receives and distributes personnel-related documents to appropriate designated staff. Provides support to the District Human Resources Liaison and staff in the area of pay, benefits, recruitment and exams. Assists with District recruitment efforts and exams. As appropriate, provides assistance or refers employee questions and/or problems pertaining to a variety of personnel-related issues to the Human Resources Division or the District Human Resources Liaison.

CORE COMPETENCIES:

As a Personnel Technician I, 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.

- Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Employee Excellence - Innovation, Integrity, Pride, Stewardship)
- Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Employee Excellence - Innovation, Integrity, Stewardship)
- Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Employee Excellence - Integrity, Pride)
- 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 - Innovation, Integrity, Stewardship)
- Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, People First, Stewardship)
- Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Employee Excellence - Integrity, People First)
- Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Employee Excellence - Collaboration, Integrity, People First)
- Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Employee Excellence - Innovation, Integrity)
- Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Employee Excellence - Integrity, Pride)

TYPICAL DUTIES:

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

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40%	E	Provides support to District 5 and Central Region employees, supervisors and managers in responding to personnel related questions pertaining to benefits, pay, leave balances, retirement, disability (NDI/SDI) and other benefit-related personnel matters. Performs the necessary research required to resolve employee issues such as benefits, pay and leave balances. If necessary, refers technical questions to District Human Resources (DHR) or the District Human Resources Liaison. Receives, reviews and forwards to DHR all health, vision and dental benefit documents. Serves as the Employee Recognition Program (ERP) Coordinator which is the single point of contact for the District regarding all the programs within the ERP. Receives and reviews ERP forms, provides them to the headquarters ERP, tracks requests, collects certificates and forwards to supervisors, answers questions/provides information regarding ERP.
20%	E	Provides brochures, literature and appropriate forms detailing various personnel pay and benefit programs. Receives, distributes, and tracks a variety of personnel-related documents, such as Individual Development Plans (IDP), Probationary Reports, Merit Salary Adjustments, Range Change approvals, Notice of Personnel Actions, and Health and Dental benefits forms, etc. Serves as the Staff Central Liaison for the District and assists in the critical role and responsibility of assisting employees and supervisors with timesheets and troubleshooting problems that can be resolved at the district level. Uses the on-line tools provided by Staff Central for guidance on Questions and Answers, Reporting Tools, Employee Tools, Supervisor Tools, along with any other tools available.
15%	E	Provides support at the District level to the Examination Program by coordinating local exams and serving as assistant proctor or receptionist. Assists with the administration of the examination process and coordinates with the Exam Unit and District to secure rooms to conduct examinations. Communicates with the public regarding the exam process and answers questions regarding exam minimum qualifications, etc. Assists the District Human Resources Personnel Liaison with the more complicated examinations. Assists hiring managers with interview preparation by scheduling candidates and creating interview packets. Provides assistance with District recruitment efforts and attends recruitment events.
15%	E	Conducts new employee orientations and sends completed documents to DHR Transactions for processing. Assists employees with the completion of necessary forms, answers questions pertaining to forms, benefits and payroll. Ensures proper completion and timely submission of 1-9 Forms for district/region employees to Headquarters Human Resources.
5%	M	Administers the District student assistant and volunteer hiring process by ensuring policy is followed in interpreting and applying departmental regulations, laws and rules, government codes, policies and procedures and provide information, training, and awareness of these programs to management and employees. Continues with the hiring of these types of employees, processing time sheets, assisting with the pay process, resolving pay/time/budget issues.
5%	M	On behalf of the District, coordinates with Human Resources to access and review a copy of an employee's official personnel file. Responsible for receipt, security and return and/or shredding of confidential file information in accordance with established policies and procedures. Coordinates the annual open enrollment campaign each year, which includes providing updated open enrollment links to the District intranet, disseminating information to employees regarding deadlines, proper form completion, and adhering to deadlines for the event. Provides backup to the District Human Resources Liaison.

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

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of: Must have knowledge of basic grammar, spelling, punctuation and math;

Governmental principles, practices, and organization; principles and modern methods of business administration; modern office methods; basic computer applications; current personnel policies and procedures; and effective communication techniques with groups and individuals. Requires thorough understanding of unit function in relation to the specific departmental objectives under which the unit operates and the overall departmental mission.

Ability to: Evaluate and identify administrative problems and be able to adopt an effective course of action, and carry out the desired solution. Ability to provide basic technical information to others in subject matter within area of responsibility; refers other issues to appropriate area. Plan and organize daily tasks. Must be able to establish and maintain professional and respectful working relationships with all levels of staff. Must have effective writing and speaking skills. Must be able to read, analyze,

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interpret, evaluate, and choose alternatives from regulations, administrative laws, medical reports, statistical reports, and a variety of other technical information. The incumbent must have the ability to multi-task and follow oral and written instructions. Incumbent is expected to work independently with a high degree of initiative and motivation, and provide exceptional customer service to stakeholders. The incumbent must ensure that accurate and timely information is communicated at all times to District 5 and Central Region employees so that they can make informed decisions regarding their pay and benefits.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Poor decisions could result in the loss or delay of employee pay and benefits. Errors during the recruitment process could result in a violation of state personnel policies. An erroneous decision made in the exam process could result in compromising the integrity of the exam.

PUBLIC AND INTERNAL CONTACTS

Independently confers with all levels of Caltrans management and staff, both District and Headquarters, as well as members of the general public. May also consult with staff from various control agencies for guidance and/or assistance.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The successful candidate will have the ability to multi-task with speed and efficiency. Required to effectively deal with emotionally charged personnel situations with employees. Must work with multiple programs and meet timelines. Employees may be required to sit for long periods of time using a keyboard, mouse and video display terminal. May also be required to move medium size boxes of material and packages from one location to another. The incumbent must be able to: bend, stoop, push, pull, lift office equipment, and perform continuous hand movement while writing or using the computer. The incumbent must be confidential, tactful and treat others with respect, behave in a fair and ethical manner toward others, remain composed under internal/external pressures, and be able to develop and maintain cooperative working relationships and demonstrate a sense of responsibility and commitment to public service. There may be occasional stressful situations when meeting deadlines are imperative. Must be open to change and assimilating information to adapt behavior and work methods in response to new information, changing priorities, or unexpected events.

WORK ENVIRONMENT

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. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises, as determined by the Department. The selected candidate may be required to travel to the headquartered location. All expenses to travel to the headquartered location will be the responsibility of the selected candidate.

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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