

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday - Friday / 8:00am - 5:00pm		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Personnel Specialist		WORKING TITLE Personnel Specialist	
DIVISION/OFFICE/UNIT Human Resources Bureau/Personnel Transactions Section		SPECIFIC LOCATION ASSIGNED TO Sacramento Headquarters	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☐ Yes ☒ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED None	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291 - 331 - 1303 -	
<p><i>The mission of the California Department of Tax and Fee Administration is to make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.</i></p>			
<p>POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under the general supervision of the Personnel Supervisor I, the Personnel Specialist (PS) applies state laws, departmental rules and regulations, and bargaining unit provisions pertaining to a variety of personnel transactions. The PS is responsible for processing appointments, separations, payroll, and benefits for California Department of Tax and Fee Administration (CDTFA) employees and related personnel transactions functions. The PS will communicate with all levels of staff and a variety of control agencies.</p> <p>Candidate must be able to perform the following essential job functions with or without reasonable accommodation.</p>			
PERCENTAGE OF TIME SPENT	DUTIES		
55%	<p><u>ESSENTIAL JOB FUNCTIONS</u></p> <p>Reconcile and certify monthly payroll using the State Controller's Office (SCO) Master Payroll Certification (MPC) input system, which includes dock pay, overtime, and special pay. Initiate, establish, and/or collect salary advances, garnishments, and accounts receivables; provide employees with prior notice as required.</p> <p>Use SCO's Personnel Information Management System (PIMS) to update employment history of employees such as appointments, separations, retirements, and other miscellaneous changes. Establish and change employee benefits and effective dates in accordance with the California Public Employees Retirement System (CalPERS), California Department of Human Resources (CalHR), and State Personnel Board (SPB) regulations. Update employee health benefit status on the Affordable Care Act System (ACAS).</p> <p>Maintain, audit, and certify on-line employment certification lists in accordance with SPB laws and rules while complying with guidelines for State Restriction of Appointments (SROA) and surplus hiring; and authorize final approval of management's commitment to hire to ensure the legality of all CDTFA hires.</p> <p>Maintain the California Leave Accounting System (CLAS) by researching, correcting and updating employee leave usage and earnings via monthly audit of 634 forms; and, administer and calculate Non-Industrial Disability (NDI), Enhanced Non-Industrial Disability (ENDI), State Disability Insurance (SDI), and catastrophic leave donations for eligible employees.</p>		
40%	<p>Acts as the technical information source for management, employees and attendance coordinators by researching a variety of manuals and sources; advise attendance coordinators; resolve employee issues regarding pay and/or benefits in accordance with Bargaining Unit Contracts, SCO, CalPERS, CalHR, and SPB. Utilize Microsoft Office Applications to prepare various letters and memoranda to control agencies, employees and attendance coordinators; handle sensitive and confidential information and documents.</p>		
5%	<p><u>MARGINAL JOB FUNCTIONS</u></p> <p>Research and prepare various monthly reports for management, control agencies and staff, such as retroactivity report, salary advance report, and fiscal and calendar year-end reports. Perform employment verifications. Perform other job-related duties as required.</p>		

291 - 331 - 1303 -**WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):****Work Environment:**

- Position located in a high-rise building.
- Office setting with an open floor plan and high partitions.

Physical Abilities:

- Daily use of a personal computer and telephone.

Additional Requirements/Expectations:

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I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.

PRINT EMPLOYEE NAME

EMPLOYEE'S SIGNATURE

DATE

I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.

PRINT SUPERVISOR NAME

SUPERVISOR'S SIGNATURE

DATE

HRB Approval Date: 10/5/2026**C&P Analyst Initials: GG**