DUTY STATEMENT

☐CURRENT ☒PROPOSED

RPA Number: **HRC0001312**	Classification/CBID: **Analyst II/R01**	Position Number: **810-260-5393-003**
Incumbent Name:	Working Title: **Transaction Analyst**	Effective Date:
Tenure: **Permanent**	Time Base: **Full-Time**	Intermittent Hours Per Month:
Program/Division: **Administrative Services Division**	Branch/Section/Unit: **Human Resources/Transactions**	Reporting Location: **Headquarters**
Supervisor's Name: **Elizabeth Garcia**	Supervisor's Classification: **Supervisor I**	Position Telework Eligible: ☒YES ☐NO
Confidential Designation: ☐YES ☒NO	Designated Position for COI: ☒YES ☐NO	Position Designated Bilingual: ☐YES ☒NO
Supervision Exercised: ☒None ☐Lead ☐Managerial ☐Supervisory		

General Statement

This position requires the incumbent to maintain consistent and regular attendance; communicate effectively (orally and in writing if both appropriate) in dealing with the public and/or other employees; develop and maintain knowledge and skill related to specific tasks, methodologies, materials, tools and equipment; complete assignments in a timely and efficient manner; and adhere to department policies and procedures regarding attendance, leave, and conduct.

Equity Statement

The Department of Toxic Substances Control (DTSC) values diversity, equity, and inclusion throughout the organization. We foster an environment where employees from a variety of backgrounds, cultures, and personal experiences are welcomed and can thrive. We believe the diversity of our employees is essential to inspiring innovative solutions. Together we further our mission to protect California's people and environment from harmful effects of toxic substances by restoring contaminated resources, enforcing hazardous waste laws, reducing hazardous waste generation, and encouraging the manufacture of chemically safer products.

Position Description

Under the supervision of the Supervisor I, Talent Engagement Services, the Analyst II is responsible for analytical projects in support of the HRs Transaction Unit. The Analyst II researches, analyzes, and interprets laws, rules, and regulations relating to pay, appointments, separations, and leave accounting transactions. In addition, the Analyst II may act as lead to Personnel Specialists (PS) in the unit, and participates in developing process and guidelines, identifying process improvement, and making recommendations to the Supervisor I. The Analyst II serves as the departments' Management Information Retrieval System (MIRS) Coordinator, CalPERS Administrator, and main point of contact of Affordable Care Act System (ACAS). Specific duties include but are not limited to:

Essential Functions (Including percentage of time):	
35%	**Lead and Staff Training** Act as a lead in a Transactions Unit and train new PSs on the fundamentals of personnel including the various reference manuals (Personnel Administrative Manual, Payroll Procedures Manual, etc.); and instruct how to input information into the various systems (State Controller's Office [SCO – payroll, personnel, and Leave accounting], California Public Employees' Retirement System [CalPERS], etc.). Review PSs' daily work to ensure compliance with laws, rules, regulations, bargaining unit agreements, control agency directives, policies, and procedures. Identify any necessary corrections and review with staff as needed. Provide clarification on control agency directives to PSs. Make recommendations to management of necessary changes to department procedures to implement mandated changes. Ensure PSs are aware of and understand changes and the impact on procedures. Independently develop and customize on the job training plans, job aides, tools, and checklist commensurate with new employee's experience and background and ensure consistency throughout the Unit. Provide input to Supervisor I regarding staff job performance and prepare training need assessments, as necessary. Recommend where needed if an employee would benefit from a work improvement plan related to work procedures and/or processes.
25%	**Research and Consultation** Research and resolve the most complex and non-routine transactions including payroll, appointment, and separation issues and keep management apprised. Analyze and apply the laws, regulations, bargaining unit agreements, settlement documents, policies, standards, and procedures relating to personnel transactions. Audit exception reports (ding notices) from control agencies and ensure appropriate corrective action is taken. Consult with personnel transactions manager and control agencies as necessary to resolve complex personnel actions. Act as a Subject Matter Expert (SME) on complex Transactions cases by researching, training, and providing consultation to Transactions staff. Consult and serve as an expert technical resource on the complex and sensitive personnel matters with other programs within HR. Performs various personnel, payroll, and benefit master data audits for all Appointment and Separations, including compliance with Timely Payment of Wages, Salary determinations, alternate range change determinations, and processing of SCO mass updates. Process monthly Telework stipends, CalPERS Service Credit Requests, and generating reports as necessary utilizing SCO's Management Information System (MIRS), and other available resources in response to departmental and HR management requests for various position related data. Prepare various monthly, quarterly, and annual reports as needed. Reviews and distributes incoming communications from various control agencies including CalPERS, CalHR, State Personnel Board (SPB), and SCO, and ensures updates are communicated to staff timely.
20%	**Subject Matter Expert** Research, analyze, and assist in monitoring outstanding Accounts Receivables (ARs) to determine if the appropriate method of collection is being applied. Ensures all outstanding ARs are accurately calculated and satisfied on an on-going basis. Create and maintain a monthly tracking system and prepare status reports on all outstanding accounts; provide updates to HR management and work closely with PS staff to timely resolve various issues. Assist PS staff with identifying the reason for the ARs when issuing the notification letters. Update AR reason in tracking system as needed and inform staff of all changes. Ensure that all ARs are logged and distributed in a timely manner. Research, analyze, and monitor outstanding Salary Advances (SAs) to determine the appropriate

	method of collection. Ensure that all outstanding SAs are accurately calculated and satisfied on an ongoing basis. Review and approve salary advances in the absence of the Transactions Manager. Log SAs requests and track clearance. Prepare monthly periodic status reports of outstanding accounts. Work closely with accounting staff to resolve various issues pertaining to payroll, wage garnishments, SAs, and revolving funds. Provide technical advice, assistance, and/or recommendations for establishing or revising internal procedures and processes. Manage, coordinate, and track employee leave balances in an effort to reduce leave balances to or below 640 hours, in accordance with CalHR Policy. Create and disseminate statistical reports to all level of departmental staff including Executive Management. Serve as an HR subject matter expert on committees or hearings as needed for the department.
15%	**Special Projects** Serve as the Department's Management Information Retrieval System (MIRS) Coordinator, Responsible for identifying, developing, and generating monthly (MIRS) reports to assist PS staff in processing personnel and pay related transactions (e.g., merit salary adjustments, range changes, appointments with expiration dates) in a timely manner; validate for accuracy and completeness of data. Create adhoc reports as requested by HR management, Executive staff, and Fiscal Office, for special projects and/or control agency drills. Update and maintain the Department's MIRS library and inventory of reports as needed. Serve as the Department's CalPERS Administrator. Responsible for reviewing, approving, and modifying staff's access for the MyCalPERS system. Review and research invoices received from CalPERS in the MyCalPERS system for the Department to authorize payment for mandatory arrears, adjustments, etc. Access and review CalPERS Cognos reports to verify employee information, invoice accounts, and dates. Serve as the Department's Affordable Care Act (ACA) Coordinator. Ensure the reporting in the ACAS is accurate and complete in order to meet the Federal Patient Protection and Affordable Care Act. Review and audits the ACA monthly and quarterly exception/compliance reports; resolve any discrepancies identified. Compile reports and submit; accordingly, ensure annual reports are filed with the Internal Revenue Services (IRS) as required. Work closely with CalHR, the SCO, and the CalPERS to ensure the State's reporting compliance provisions are met. Provide direction, guidance, and assistance to the PS staff when reviewing, inputting and correcting codes in ACAS.
Marginal Functions (Including percentage of time):	
5%	**Other Related Duties** Perform administrative duties including, but not limited to adhering to Departmental policies, rules, and procedures; accurately reporting time in the Daily Log system: submitting timesheets by the due date.
Consequences of Error: (if applicable)	
Failure to perform the duties of the position could result in incorrect or incomplete information disseminated to management and staff; inappropriate or illegal personnel actions; and the inability of the unit or DTSC to meet its goals or objectives. Consequences can range from minor correctable informational errors with limited impact to sanctions by CalHR, SCO, or SPB affecting the entire Department, such as loss of delegation, Department of Labor claims, fines, and legal repercussions.	
Typical Physical Conditions/Demands:	
The incumbent works intermittently in high rise building with artificial light and temperature control. The incumbent is required to use personal computer and other office equipment, including, but not limited to telephone, fax machine, scanner, and copy machine. No specific physical requirements are present.	

Typical Working Conditions:

Works in multi-story building, in a cubicle office setting using a variety of office equipment, e.g., computers, telephones, copiers, etc., with artificial light and temperature control, and attends meetings in similar settings. On an as-needed basis, work outside normal work hours, including evenings and weekends, may be required. A hybrid telework schedule may be available (the incumbent will be expected to be available through various platforms throughout the day to communicate on work related activities). The work schedule is Monday through Friday. Travel may be required locally and within the state. If travel is required, it will be by commercial carrier or auto, whichever method is in the best interest of the State. This position will have daily contact with DTSC staff, external state, and federal agencies, and local government representatives, and the public either in person, via email/telephone, or videoconferencing.

Special Requirements of Position (Check all that apply):

☐ Duties performed may require pre-employment and/ or routine screenings (background/criminal/fingerprint clearance, drug testing, fingerprinting, physical, etc.).

☐ Duties require participation in the DMV Pull Notice Program.

☐ Performs other duties requiring high physical demand. (Explain below)

☐ Requires repetitive movement of heavy objects and/or operation of heavy machinery or motorized vehicles.

☒ Other (Explain below)

Explanation:

The incumbent must be familiar with computer programs such as Microsoft Excel, Word, PowerPoint, Outlook, OneDrive, and SharePoint. The incumbent should have experience: working with changing priorities and resolving issues that do not have clear answers; maintaining confidentiality; researching, interpreting, and applying laws, rules, bargaining unit contracts, practices, and principles of governing the State's personnel management practices; analyzing complex data and providing recommendations and/or feedback to all levels of staff. The incumbent must have the ability to work cooperatively with staff at all levels both within and outside the department and be able to effectively communicate verbally and in writing information to complete work assignments.

Supervisor Statement

I certify this duty statement represents an accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.

Supervisor Name	Supervisor Signature	Date

Employee Statement

I have discussed these duties with my supervisor and have been provided a copy of this duty statement. I certify I have read, understand, and can perform the duties of this position either with or without reasonable accommodation*.

**A Reasonable accommodation is any modification or adjustment made to a job, work environment, or employment practice or process that enables an individual with a disability or medical condition to perform the essential functions of his or her job or to enjoy an equal employment opportunity. (If you believe reasonable accommodation is necessary, check yes. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Reasonable Accommodation Coordinator.)*

Do you need a reasonable accommodation to perform the essential functions of this position?	☐**YES** ☐**NO**	
Employee Name	Employee Signature	Date

HUMAN RESOURCES BRANCH USE ONLY:

☐ Duties meet class specifications and allocation guidelines.

☐ Exceptional allocation, STD 625 on file.

Analyst initials: Click or tap here to enter text. Date Approved: Click or tap to enter a date.
Revision Date (if applicable): Click or tap to enter a date.