Duty Statement

Classification: **Office Technician (General)**

Position Number: **275-410-1138-003**

HCM#: **5018**

Branch/Section: **Retirement Benefit Services Division / Special Programs Sections / Forms Administration Unit**

Location: **Sacramento, CA**

Working Title: **Forms Administration Specialist**

Effective Date: **October 12, 2026**

Collective Bargaining Identifier (CBID): **R04**

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

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

The Retirement Benefit Services Division (RBSD) supports the processing of retirement, survivor, and disability benefits for CalPERS members. In addition to processing requests for these benefits, the division responds to telephone, internet and written requests for information and other inquiries from members, employers, and annuitants.

The Forms Administration Unit within RBSD is primarily responsible for processing various retirement forms submitted by CalPERS members, retirees, beneficiaries, and survivors, such as CalPERS Attorney documents, Conservatorship and Guardianship documents, Direct Deposit Authorization, Tax Withholding Election, Lump Sum Beneficiary Designations, and Requests for Payment to a Trust. The unit also processes requests for name changes for benefit payees, income verifications, and gross monthly allowance for Social Security Administration.

Under the general direction of the Supervisor I, the Office Technician (General) performs advanced clerical duties to process and evaluate retirement-related documents, maintain participant records in myCalPERS, and respond to inquiries from members, business partners, and internal staff. The position applies established laws, policies, and procedures to determine appropriate actions on submitted forms, update system records, and generate correspondence regarding processing outcomes. The role requires independent judgment within defined guidelines and regular coordination with internal units to ensure accurate and timely handling of participant information.

Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members**.**

45% Onsite[1] and virtually, review various retirement forms such as Lump-sum Beneficiary Designation, Direct Deposit Authorization, Power of Attorney documents, and Tax Withholding Election submitted by CalPERS participants that impact their monthly benefits. Determine approval or rejection of submitted forms per requirements prescribed in the Public Employees' Retirement Law (PERL) and established policies and procedures. Enter or update participants' information in myCalPERS as reflected on the form/document provided. Generate letters to notify the participants that forms have been processed or rejected. Provide reason(s) for rejection of form and clear direction on how to resubmit. Document action taken on the account by adding clear and detailed participant notes in myCalPERS.

Onsite and virtually, process requests for income verification, gross monthly allowance breakdown, and name changes received from third party/business partners with the appropriate authorization from CalPERS members/retirees.

Onsite and virtually, review unidentified documents received in the Benefit Payments Documents queue. Determine if these documents should be processed by the unit or forwarded to another area in the enterprise for processing. Notate action taken in myCalPERS for historical purposes.

Onsite and virtually, process daily assigned work by reviewing forms, updating records in myCalPERS, and completing required workflow steps in accordance with established procedures to support accurate and consistent processing of participant benefit information.

35% Onsite and virtually, respond to inquiries by providing information or clarification as required by established procedure. Update myCalPERS with the appropriate detailed notes to document resolution of inquiries.

Onsite and virtually, respond to telephone calls received from unit line which may be from other areas in CalPERS or the participants. Review account information in myCalPERS, interpret applicable procedures, and communicate required information or next steps to callers to support resolution of issues brough to the unit's attention. Determine whether issues need to be escalated to the unit lead or supervisor for resolution.

Onsite and virtually, contacts representatives from across the enterprise to coordinate information and responses to address concerns or issues received from participants to support accurate resolution in accordance with established procedures.

10% Onsite and virtually, process unit's returned mail in accordance with established procedures. Determine the appropriate handling of various forms received by utilizing procedures, myCalPERS, and knowledge of CalPERS business areas.

Onsite and virtually, forward forms and documents to Document Management Center for scanning to participants' accounts to generate workflows so that these forms and documents will be processed in myCalPERS system.

5%	Onsite and virtually, participate in review of current business processes to ensure compliance and uniform application of established policies and procedures. Document and submit recommendations for process improvements to the supervisor based on issues identified during daily workload processing.
5%	Onsite and virtually, perform other duties as assigned and appropriate for this classification.

Working Conditions

- [1] This position is designated as office-centered and works primarily onsite at the Sacramento, CA -Headquarters at least three weekdays.
- Sitting, standing, lifting, pushing, and pulling requirements are consistent with office work.
- Artificial lighting and temperature control when working onsite.
- Prolonged reading and typing on a laptop or keyboard and monitor.

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance.
- Ability to perform effectively with professionalism and accuracy.
- Ability to demonstrate punctuality, initiative, and dependability.
- 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 represent the duties of the position.

Supervisor Signature:_____ **Date**: