STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/16/2026
HR Initials
CB

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00141	**Effective Date**
Classification Title Personnel Specialist	**Position Number** 564-182-1303-023
Working Title Personnel Specialist - Payroll and Benefits	**Bureau and Section** Business and Human Resources Bureau Personnel Services Section

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. To support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the close or general supervision of the Personnel Supervisor I, the Personnel Specialist is responsible for the processing of personnel transactions affecting permanent full-time and hourly employees for the department. Upon entry level, the incumbent performs the least difficult transaction duties. Under close supervision at the entry level, and under general supervision at the journey and advanced levels, and in accordance with established procedures, incumbents are assigned progressively more complex and difficult transaction duties in a variety of personnel transaction areas. The incumbent will encourage friendly customer service among team members. This is one of multiple positions, each responsible for different, and often multiple payroll unit codes (PUC) throughout the department.

Essential Functions

Percentage	Description
40%	Tracks and processes hours worked for full-time, intermittent, part-time, seasonal and retired annuitant employees to ensure time limits are not exceeded to ensure compliance with applicable departmental, state and/or federal laws, rules, regulations, policies and/or guidelines. Responsible for the document processing of personnel changes that include: appointments, separations, attendance records, shift differential, range changes, overtime, wage garnishments, Merit Salary Adjustment (MSA) slips, and miscellaneous deduction changes.

	Processes/verifies salary advance requests and submit to Fiscal Accounting for payment.
20%	Under the State Controller's Office (SCO) decentralized system, is responsible for the keying of appointments, separations, address changes, overtime, premium pay documents and shift documents online to State Controller Office through a personal computer. Utilizes SCO system (PIMS, HIST, CSP, MPC, REPT, PIP, CLAS, and ACAS) to make necessary updates and respond to employee inquiries. Submits payroll forms to SCO through Connect HR system.
20%	Acts as a liaison with control agencies such as SCO, California Public Employees' Retirement System (CalPERs), California Department of Human Resources (CalHR), and other State of California human resources departments in resolving complex benefit issues and responding to customer inquiries. Responsible for reviewing and processing Direct Pay and Federal Consolidated Omnibus Budget Reconciliation Act (COBRA) enrollments for Health, Dental, and Vision benefits.
10%	Audits employee timesheets received from Timekeepers and keys appropriate leave usages into the department's automated leave accounting system (TimePortal/eTime) and the SCO leave accounting system (CLAS). Corrects systems to reflect information received on revised timesheets from Timekeepers and/or employees.

Marginal Functions

Percentage	Description
10%	Responsible for project assignments that will include periodic position control reports and retroactivity reports. Perform the least complex special projects as assigned by the Personnel Services Section management.

Employee:

I confirm that I have read and understand the described duties and functions of this position.

Name (Print)	Signature	Date

Supervisor:

I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)	Signature	Date