Duty Statement

Classification: **Analyst II**

Position Number: **275-410-5393-731**

HCM#: **1589**

Branch/Section: **Retirement Benefit Services Division / Specialized Retirement Calculations & IRC 415b / Specialized Retirement Services**

Location: **Sacramento, CA**

Working Title: **Retirement Benefit Processing Analyst II**

Effective Date: **November 1, 2026**

Collective Bargaining Identifier (CBID): **R01**

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

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

The Retirement Benefit Services Division (RBSD) provides benefits and information to participants, retirees, beneficiaries, survivors, and business partners. Monthly retirement benefit payments exceed $2.5 billion to over 700,000 annuitants.

The Specialized Retirement Calculations & IRC 415b section handles specialized casework, such as non-member retirement benefits, optional member retirement benefits and Forfeiture of Benefits cases, supports annual Cost-of-Living Adjustment (COLA) and Purchasing Power Protection Allowance (PPPA), year-end tax processes, and processes all retirement estimates. This area also processes casework related to community property retirement benefit processing. Once a member decides to retire and submits their Service or Non-Member Retirement Application, it is the responsibility of the team members in the Specialized Retirement Services unit to respond to and resolve sensitive, specialized analytical casework for the full range of retirement and adjustment allowance benefits involving claims from members needing administrative remedies.

Under direction of the Supervisor I, in the Specialized Retirement Services Unit, the Analyst II performs analytical work involving specialized retirement benefit calculations, adjustments, and case resolution. The incumbent researches and evaluates retirement benefit cases, interprets applicable laws and policies, and develops findings, case actions, and recommendations. The position also evaluates retirement system defects and proposed enhancements, assesses operational impacts, and participates in system testing and annual benefit validation activities.

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, independently research, interpret, and apply the California Public Employees' Retirement Law (PERL), policies, and procedures to analyze retirement benefit cases and prepare case actions and recommendations. Analyze and process retirement calculations and adjustments, including illegal retirement cases, wrongful termination cases, adjustments resulting from internal and external compensation-reporting audits, legal settlement adjustments, reinstatement calculations, re-retirement calculations and estimates, optional member calculations, Working After Retirement violation adjustments, Temporary Annuity cases, and death adjustments.

Onsite and virtually, prepare responses to sensitive correspondence and inquiries escalated by CalPERS members or business partners for the analyst's signature or the signature of a section leader, assistant division chief, or division chief. Provide retirement benefit process information to members, beneficiaries, and external stakeholders by explaining applicable requirements, case status, and next steps.

Onsite and virtually, independently and in collaboration with internal and external section leaders, review and analyze system-generated reports for accuracy and quality assurance. Reports include the Monthly Overpayment Aging Report, Negative Receivables Report, and Temporary Annuity Exit Report. Communicate verified discrepancies to team members and leaders in accordance with established escalation procedures. Provide leadership with feedback regarding data accuracy, opportunities for improvement, and resolution of report issues.

35% Onsite and virtually, coordinate assigned system-support activities by reviewing reported issues, assessing impacts, and preparing recommendations for leadership and the Automation Support Unit. Provide support, advice, and guidance regarding myCalPERS System Defect Requests (SDRs) and System Enhancement Requests (SERs). Collaborate with section analysts and the Automation Support unit to review and analyze newly identified SDRs and SERs submitted by section team members and leadership. Evaluate the validity of each request and recommend whether it should be rejected or referred to the Automation Support unit for triage and consideration for a future myCalPERS release. Prioritize requests based on workload volume, availability of a reasonable workaround, operational impact, and enterprise risk. Serve as a tester for myCalPERS releases affecting RBSD. Develop test scripts, provide guidance to other testers, and help maintain RBSD testing standards. Coordinate communications with team members, leadership, and business partners regarding pending SDRs and SERs, releases, and testing outcomes. Provide demonstrations and training and create or update job aids documenting system changes.

Onsite and virtually participate in annual Cost-of-Living Adjustment (COLA), Purchasing Power Protection Allowance (PPPA), and year-end tax validation activities. Review records, compare data, identify discrepancies, apply appropriate adjustments, document issues for leadership review, and recommend resolution strategies affecting retirement calculations.

Onsite and virtually, independently conduct case analysis and research, collect facts from various sources, and prepare written Administrative Remedy recommendations. Respond to public records requests and assist in preparing legislative analyses and regulatory materials, as assigned.

15% Onsite and virtually, mentor entry-level analytical team members and provide quality-assurance support for assigned workloads by reviewing selected retirement benefit casework, explaining applicable calculation requirements, and providing technical feedback and recommended corrections. Identify training needs within the initial retirement and retirement-calculation processes and report them to the appropriate training unit. Provide informal one-on-one training in reinstatement, re-retirement involving less than and greater than one-year, illegal retirement, and Temporary Annuity workloads.

Onsite and virtually, prepare case documentation for referral to the Legal Office for administrative hearings. Provide testimony in administrative law hearings, as assigned.

5% Onsite and virtually, perform other duties as assigned that are appropriate for the classification.

Working Conditions

- [1] This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Occasional overnight travel may be required.

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance.
- 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 represents the duties of the position.

Supervisor Signature:_____ **Date**:

Duty Statement

Classification: **Analyst II**

Position Number: **275-410-5393-708**

HCM#: **1719**

Branch/Section: **Retirement Benefit Services Division / Specialized Retirement Calculations & IRC 415b / Specialized Retirement Services**

Location: **Sacramento, CA**

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