Duty Statement

Classification: **Analyst II**

Position Number: **275-520-5393-011**

HCM#: **1842**

Branch/Section: **Health Policy & Benefits Branch, Health Account Management Division, Administration, Automation & Project Management, Health Benefits Administrative Support Section, Branch Projects & Support Unit**

Location: **Sacramento, CA**

Working Title: **Branch Budget Analyst**

Effective Date: **October 6, 2026**

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

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

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

The Health Account Management Division (HAMD) is responsible for member health account management and marketing the CalPERS health program to employers; contracting with employers to provide CalPERS health benefits; health enrollment and eligibility for State and public employees, retirees, and their families; handling members' requests for administrative hearings and requests for extended coverage to over-age dependents; and billing public agencies offering CalPERS health benefits monthly. HAMD assists health plans, health benefit officers from state and public agencies, school districts, and members by providing eligibility determinations and enrollment services. The Health Branch Administration Support (HBAS) Section provides administrative support to the Health Policy and Benefits Branch (HPBB).

Under direction of the Supervisor I of the Branch Projects & Support Unit (BPSU), the Analyst II independently performs administrative analysis for contracts, letters of engagement, procurement packages, invoices, and budget support within the HPBB. The incumbent reviews and processes contract, procurement, and budget documents; analyzes financial and procurement information; coordinates with contract leaders, vendors, the Operations Support Services Division, the Financial Office, and leadership; and prepares reports, recommendations, and process updates to support branch contracting and fiscal operations.

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**.**

40% Onsite[1] and virtually, analyzes HPBB budget organization and expense codes, tracks expenditures against budgetary authority set by the CalPERS Board of Administration and Department of Finance (DOF) and coordinates updates with branch leadership and the Financial Office's (FINO) budget and accounting representative(s). Develops expenditure projections, identifies budget variances, and prepares recommendations to address over-expenditure risks and other funding issues. Conducts research on financial data and prepares supporting analysis for Budget Change Proposals (BCPs), Finance Letters, Formal Budget Requests (FBRs), and annual operating budget submissions. Maintains tracking logs, prepares monthly, quarterly, annual, and ad hoc reports, updates related SharePoint Collaboration pages and related procedures, and coordinates meetings to provide budget status updates and recommendations

20% Onsite and virtually, provides backup support for contracts leadership by reviewing Letters of Engagement (LOEs), procurement packages, requisitions, purchase orders, and related documents in PeopleSoft Financials, eProcurement, spreadsheets, and databases. Verifies that required contract documents are complete, identifies missing information or funding issues, and routes materials to appropriate approving team members or leaders. Reviews contract invoices for accuracy, coordinates leadership approval, and prepares amendments for changes to scope, cost, or schedule of deliverables. Maintains tracking logs, SharePoint Collaboration pages, and contract-related procedures, and provides status updates to contract and branch leaders.

20% Onsite and virtually, coordinates Requests for Proposals (RFPs), contracts, interagency agreements, and solicitations in accordance with the CalPERS Administrative Manual, CalPERS Contracting Procedural Manual, State Contracting Manual, State Administrative Manual, and State laws and regulations (e.g., Government Code and Public Contract Code) by preparing routing documents, reviewing submissions for completeness, and tracking status in PeopleSoft Financials, eProcurement, spreadsheets, databases, etc. Assist contract leaders with document preparation for vendor selection and contract execution, verifies funding availability, reviews invoices for accuracy, and prepares contract amendments for approval when scope, cost, or schedule changes are identified. Maintains tracking logs, reports, SharePoint Collaboration pages, and contract procedures, and provides status updates to leadership and stakeholders.

15% Onsite and virtually, processes requisitions in PeopleSoft Financials or other appropriate systems, reviews them for completeness and accuracy, and routes items for the appropriate approval. Matches invoices to purchase orders, identifies discrepancies, and coordinates corrections before payment processing. Maintains tracking logs, databases, and expense files to monitor encumbrances and remaining balances.

5% Onsite and virtually, performs other duties as assigned and appropriate for the classification.

Working Conditions

- [1]This position is designated office centered and works primarily onsite, CalPERS Headquarters - Sacramento, CA, at least but not limited to three weekdays.

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**: _____