Duty Statement

Classification: **Analyst II**

Position Number: **275-713-5393-XXX**

HCM#: **2562**

Branch/Section: **Customer Services & Support Branch / Member Account Management Division / Service Credit Purchase & Elections Section / Account Maintenance / Account Maintenance Team 1**

Location: **Sacramento, CA**

Working Title: **Account Maintenance Analyst**

Effective Date: **January 1, 2026**

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

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

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

The Member Account Management Division (MAMD) administers the Service Credit Purchase & Elections (SCPE) Program. Services include assisting with requests and elections for purchasing service credit, providing refunds of member contributions, and conducting in-depth research and analysis of member accounts to address potential service credit accrual discrepancies. The division also provides a wide range of administrative support to six divisions in the Customer Services & Support (CSS) Branch. In this capacity, the Branch Administrative Services Section (BASS) coordinates human resources support for approximately 900 team members, oversight of the $121 million branch budget, and data collecting and reporting of CalPERS CSS Customer Service metrics.

Under the direction of the Supervisor I, over the Account Maintenance Unit, the Analyst II provides technical expertise, research, and administrative support for account maintenance activities and performs the following duties and responsibilities:

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, provides system technical support to the team members within the Account Maintenance Units by completing research, developing issue documents, following up on system issues, and providing desktop training to team members to resolve technical challenges and ensure accurate documentation. Documents service credit purchases,

Rollovers, and Plan-to-Plan transfer decisions in the myCalPERS system and Peoplesoft Financial system according to established procedures and policies. Ensures the payments are documented and tracked in accordance with the Public Employees' Retirement Law (PERL), CalPERS and MAMD policy, approved memoranda, legislative analysis and assignments, or other appropriate authorities. Develops proposals and recommendations for leadership approval when technical issues cannot be resolved or are not addressed by existing authoritative citation. Verifies workflow requests have been closed and the account was noted with the actions completed. Notifies leadership in writing when workflow requests are not complete, including details of outstanding actions. Uploads documents to the myCalPERS document history. Completes a Workload Accountability Log daily to account for tasks completed. Assists leadership in the gathering and capturing of system issues and statistical information using myCalPERS, SharePoint, and Excel.

25% Onsite and virtually, uses CalPERS tools and resources such as myCalPERS, microfiche, microfilm, or information from participants, business partners, other retirement systems, or third-party vendors such as Financial Institutions, to review, research, evaluate, correct, monitor, and process all types of account maintenance on Service Credit Purchase (SCP) and Tier Conversion records (such as, balance due calculations, resolutions of discrepant accounts, and payment schedule changes). Conducts research, analyzes, interprets, and applies applicable statutes, regulations, policies, and procedures to investigate and resolve complex cases (such as Reinstatements, CP Splits, Correction Cases, special projects) and issues, including participant requests for balances owed on their account, payroll deduction records, service credit posting to participant accounts, documents associated to a participant's account, and other significant data. Communicates information by phone and in written correspondence to participants, business partners, other retirement systems, third party vendors, CalPERS team members, and leadership. Verifies the accuracy of output documents. Prepares and sends confirmation letters and authorization documents to participants, business partners, other retirement systems, and third-party vendors such as Financial Institutions using Adobe Acrobat Pro and Microsoft Office products.

Onsite and virtually, participates as the Subject Matter Generalist in System Enhancement Requests (SER) for system release enhancements which include User Acceptance Testing (UAT), presentations, Joint Application Requirement (JAR) sessions, and Joint Application Design (JAD) sessions.

Onsite and virtually, ensures decisions made and responses rendered on service credit purchase and tier conversion records are in compliance with the PERL, CalPERS, and MAMD policy, approved memoranda, legislative analysis and assignments, or other appropriate authorities. Drafts proposals and recommendations for leadership approval when eligibility issues or account discrepancies cannot be resolved or are not addressed by existing authoritative citation.

20% Onsite and virtually, responds to complex participant and business partner correspondence and inquiries (such as Reinstatements, CP Splits, Correction Cases, special projects) via phone call or myCalPERS member self-service messaging. Prepares administrative remedies, legal appeals, and summary of events using Adobe Acrobat Pro and Microsoft Office products. Reviews and responds to assignments that require additional research. Develops and prepares written recommendations correspondence, legal opinion requests,

and issue memos for leadership review to help resolve eligibility issues or account discrepancies related to service credit purchases and tier conversion records that are not prescribed by laws and policies.

5% Onsite and virtually, develops proposed alternatives and recommendations for leadership approval regarding account maintenance issues on service credit purchases and tier conversion records. As assigned, writes procedures for policy changes, systems changes, new legislation, or improved methods for leadership review. Drafts new procedures and conducts the functional training for team members in the Account Maintenance Unit. Assists in the development of revisions and updates for various manuals and publications (e.g., Public Agency and State Agency manuals, booklets) for MAMD-related areas.

Onsite and virtually, participates in projects, committees, and attends system-wide meetings as a representative of the division, and provides meeting summaries to the team leader and team members. As requested, serves as the Subject Matter Generalist for MAMD at Administrative Court hearings. Conducts presentations using Microsoft products (such as PowerPoint, Excel, Teams, Outlook) and supports exhibit coverage at the CalPERS Employer Forum or CalPERS Benefit Education Events.

5% Onsite and virtually, performs 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.
- On a rotational basis, all employees will be required to provide telephone coverage and assistance during normal office hours of 8:00 a.m. to 5:00 p.m.
- The telework days will be performed from an approved work site, within the State of California, alternative to the office.
- May require overnight/in-state travel.

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 represent the duties of the position.

Supervisor Signature:_____ **Date**: