



# Duty Statement

Classification: **Staff Services Analyst**

Position Number: **275-190-5157-109**

HCM#: **8854 JC-436611**

Branch/Section: **Customer Services and Support Branch/Customer Experience  
Division/Employer Contact Center – Employer Team 1**

Location: **Sacramento, CA**

Working Title: **Employer Contact Center Analyst**

Effective Date: **June 1, 2024**

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

Supervision Exercised:  Yes  No

Telework:  Office-Centered  Remote-Centered  Not Eligible

The CalPERS Customer Contact Center is the first point of contact for CalPERS customers, providing customer services and education by phone and correspondence concerning retirement and health benefits, applying the Public Employees' Retirement Law (PERL), Public Employees' Medical and Hospital Care Act (PEMHCA), applicable regulations, new legislation, and policy initiatives.

Under supervision of the Staff Services Manager I (SSM I), and working with Division Management, the Staff Services Analyst (SSA) performs work of average difficulty in a wide variety of consultative and analytical duties to support the customer service goals and objectives of the Customer Experience Division (CXD) and CalPERS and applies PERL and PEMCHA provisions to provide assistance to active and retired members, employers, beneficiaries, and the general public.

## Essential Functions

Remote-centered team members will be required to come into Sacramento Headquarters or their assigned Regional Office location on a routine, regular basis for instances including, but not limited to, attending CalPERS business-related meetings, picking-up and/or dropping-off of office equipment or work materials/product, attending training, and obtaining general office supplies or when your specific position requires work to be performed onsite.

- 40% Onsite<sup>1</sup> and virtually, work in a Contact Center environment provide professional assistance and information verbally to customers (active and retired members, employers, beneficiaries, and the general public) regarding CalPERS retirement and health programs via telephone. Apply the PERL and PEMHCA provisions in the analysis, interpretation, and execution of CalPERS statutes, laws, rules, regulations, policies, and procedures when responding to the various inquiries from the customer. Provide all customers with information and assistance on services provided by CalPERS, including but not limited to: the completion of health, dental, and retirement transactions, purchase of service credit, death benefits, retirement allowance options, community property, payroll issues, membership questions, and employer contracts.

Provide information on requirements for health and dental enrollments; explain membership eligibility criteria, adjustment processes, and contract and payroll requirements, as needed. Ensure that all assignments are completed within agreed upon service level expectations while adhering to the CXD Quality Assurance guidelines. Responsible for assuring the documentation of all statements and/or actions to customer's accounts are in a clear and concise manner in the myCalPERS system and are in accordance with the Division's Quality Assurance guidelines. Demonstrate the ability to type at a speed and proficiency to meet performance expectations.

- 30% Onsite and virtually, access the myCalPERS system to research and respond to customer requests for information. Respond to customer inquiries via telephone, within agreed upon service level expectations while adhering to CXD Quality Assurance guidelines. Provide professional assistance and instruction to the customer for accessing and navigating the member's account in myCalPERS.
- 15% Onsite and virtually, effectively, and efficiently resolve problems/issues that exceed the specified time frames, as assigned. Determine when issues need to be referred to an appropriate division for a more thorough response and make referrals on a timely basis and in accordance with division procedures.
- 5% Onsite and virtually, respond to customer inquiries on CalPERS retirement and health programs submitted in writing through the myCalPERS Workflow system, TTY, or fax, utilizing division approved templates when required. Review the customer's inquiries and applies the PERL and PEMHCA provisions in the analysis, interpretation, and execution of CalPERS statutes, laws, rules, regulations, policies, and procedures when responding to the customer in writing.
- 5% Onsite and virtually, may participate on the Internal Agent Assistance team by providing analytical and assistance to other telephone agents, acting as a resource for less experienced staff, in the resolution of customer issues that require analysis related to specific program area business.
- 5% Onsite and virtually, collect and analyze data related to operations; participate on project teams, make recommendations to streamline processes and improve customer service while acting as a specialist on issues related to the CXD Customer Contact Center. Make recommendations for procedural changes and/or enhancements to streamline processes or business operations. Perform other related duties as assigned.

### **Working Conditions**

- <sup>1</sup> This position is designated as remote-centered and works primarily at their designated alternate work location.
- Continuous interactions with customers via the telephone.

### **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:**