



Duty Statement

Classification: **Office Technician (General)**

Position Number: **275-410-1138-003**

HCM#: **5018**

Branch/Section: **Retirement Benefit Services Division / Warrant/Forms Administration Section / Forms Administration Unit 481**

Location: **Sacramento, CA**

Working Title: **Forms Administration Technician**

Effective Date: **September 1, 2024**

Collective Bargaining Identifier (CBID): **R04**

Supervision Exercised: ☐ Yes ☒ No

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

The Retirement Benefit Services Division (RBSD) supports the processing of retirement, survivor and disability benefits for CalPERS members. In addition to processing requests for these benefits, the division responds to telephone, internet and written requests for information and other inquiries from members, employers and annuitants.

The Forms Administration Unit within RBSD is primarily responsible for processing various retirement forms submitted by CalPERS members, retirees, beneficiaries, and survivors such as CalPERS Special Power of Attorney, Direct Deposit Authorization, Tax Withholding Election, Lump Sum Beneficiary Designations and Requests for Payment to a Trust. The unit also processes requests for name changes for retirees, income verifications and gross monthly allowance for Social Security Administration.

Under the general direction of the Staff Services Manager I (SSM I), the Office Technician (General) performs the following duties effectively and efficiently with professionalism and accuracy utilizing the myCalPERS system while adhering to the CalPERS core values and guiding behaviors.

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% Onsite¹ and virtually, thoroughly review various retirement forms such as Lump-sum Beneficiary Designation, Direct Deposit Authorization, CalPERS Special Power of Attorney and Tax Withholding Election submitted by CalPERS participants that impact their monthly benefits. Determine approval or rejection of submitted forms per requirements prescribed in the Public Employees' Retirement Law (PERL) and established policies and procedures. Accurately enter or update participants' information in myCalPERS as reflected on the form/document provided. Generate letter to notify the participants that forms have been processed or rejected. Provide reason(s) for rejection of form and clear direction on how to resubmit. Document action taken on the account by adding clear and detailed participant notes in myCalPERS.
- Onsite and virtually, process requests for income verification, gross monthly allowance breakdown and name changes received from third party/business partners with the appropriate authorization from CalPERS members/retirees.
- Onsite and virtually, review unidentified documents received in the Benefit Payments Documents queue. Determine if these documents should be processed by the unit or forwarded to another area in the enterprise for processing. Notate action taken in myCalPERS for historical purposes.
- Onsite and virtually, process daily assigned work accurately and efficiently per established procedures to maintain customer satisfaction and to meet the unit's established performance metrics monthly for the various business processes.
- Onsite and virtually, maintain knowledge and adapt to changes (temporary or permanent) in procedures to ensure accuracy and efficiency in processing daily assigned work.
- 35% Onsite and virtually, respond to inquiries received from CalPERS participants within the established service level of the division. Contact the participants by phone or email to get clarification on the requests and to resolve the inquiries to the participants' satisfaction. Update myCalPERS with the appropriate detailed notes to document resolution of inquiries.
- Onsite and virtually, handle telephone calls received from unit line which may be from other areas in CalPERS or the participants. Answer calls within the prescribed number of rings. Maintain professionalism in communicating and resolving issues brought to the unit's attention. Determine whether issues need to be escalated to the unit lead or manager for resolution.
- Onsite and virtually, work closely with representatives from across the enterprise to coordinate information and responses to address concerns or issues received from participants as appropriate.
- 10% Onsite, process unit's returned mail timely and accurately using the established procedures. Determine the appropriate handling of various forms received by utilizing procedures, myCalPERS and knowledge of CalPERS business areas.
- Onsite, forward forms and documents to Document Management Center for scanning to participants' accounts to generate workflows so that these forms and documents will be processed in myCalPERS system.

- 5% Onsite and virtually, participate in review of current business processes to ensure compliance and uniform application of established policies and procedures. Provide suggestions for process improvements based on various scenarios encountered in the processing of daily workload.
- 5% Onsite and virtually, perform other duties as assigned.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Sitting, standing, lifting, pushing, and pulling requirements are consistent with office work.
- Artificial lighting and temperature control when working onsite.
- Prolonged reading and typing on a laptop or keyboard and monitor.

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:**