



# Duty Statement

Classification: **Staff Services Analyst**

Position Number: **275-410-5157-015**

HCM#: **2711** **JC-447822**

Branch/Section: **Retirement Benefit Services Division / Retirement Application & Calc Section / Post-Retirement Adjustment Unit 419**

Location: **Sacramento, CA**

Working Title: **Post-Retirement Benefit Adjustment Analyst**

Effective Date: **September 1, 2024**

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

Supervision Exercised:  **Yes**  **No**

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

The Retirement Benefit Services Division (RBSD) addresses inquiries and supports the distributions of retirement benefits to CalPERS members, retirees, beneficiaries, survivors, and external stakeholders. As part of RBSD, the Retirement Calculation & Adjustment Team is responsible for the processing of service retirement estimates, applications, determining benefit eligibility, calculating, and releasing accurate benefit payments, and processing all eligible post-retirement adjustments to members in a timely manner.

Under supervision of the Staff Services Manager (SSM) I, the Staff Services Analyst (SSA) performs the following duties:

## 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<sup>1</sup> and virtually, serve as the primary resource to members, beneficiaries, and/or external stakeholders during the service retirement process. Maintain timely, professional, and consistent communication by phone, in writing, and/or via Web conferences. Apply the Public Employees' Retirement Law (PERL), legislation, regulations, and division policies and procedures to ensure the timely payment of retirement benefits.

Onsite and virtually, independently and as part of a team, completes assigned casework related to post-retirement service adjustments, including balance adjustments, sick-leave adjustments, post-retirement date changes, option changes, benefit allowance increases, and the modification of options.

Onsite and virtually, monitor the system to ensure service retirement benefit adjustments are released timely, meeting the Section's customer service expectations. When appropriate, route the more complex calculations (i.e., overpayment greater than 15%, separation of benefits, legacy case adjustments, etc.) to one of the section's assigned Associate Governmental Program Analyst. Identify, tabulate, and analyze errors and their impact to the program area and the member's retirement benefit. Advise team leaders of potential training needs or possible procedure updates resulting from calculating retirement benefits and/or addressing member inquiries.

30% Onsite and virtually, access myCalPERS to research, review and address post-retirement inquiries submitted by members, retirees, beneficiaries, and external stakeholders seeking assistance with the status of their benefit adjustments, sick-leave adjustments, retirement date changes, retirement cancelation, option changes, allowance increases, and the modification of options, communicating verbally and/or in writing the impacted change and any resulting overpayment.

Onsite and virtually, serve as a CalPERS' liaison to outside entities (such as employers, employee representative groups, reciprocal systems, etc.) as necessary. Coordinate the exchange of data and/or information as appropriate, following CalPERS' Information Security Guidelines.

20% Onsite and virtually, work with the appropriate internal and external stakeholders to request documentation required to successfully process estimates or service retirement applications. Work with other CalPERS program areas to review and resolve member requests which include confirming the purchase and posting of additional service credit and reporting of compliant final compensation. Work with CalPERS membership and payroll reporting sections to address appointment and/or compensation discrepancies timely, prior to processing a member's adjustment.

Onsite and virtually, keep management updated on issues that may arise during the calculation process and request additional training or resources needed to successfully complete assigned workload. Communicate timely any system defects related to the estimate or service retirement process, collaborating with unit/section leads.

10% Onsite and virtually, assist in the training of newly hired SSAs regarding processing adjustments, the distribution of letters, or managing post-retirement workload. Upon request, participate in cross trainings and assist other section team members with their workloads as needed. Participate in section training activities, regularly scheduled meetings, and teambuilding events remotely or in person. Represent the division by participating in various teams, special task forces, or annual plan initiatives. Perform other duties as needed to ensure CalPERS Strategic Goals and Service Level Agreements are met.

**Working Conditions**

- <sup>1</sup> This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Office setting with prolonged periods of sitting.
- Ability to use a computer keyboard and read from computer screens several hours a day.
- Conduct verbal customer service outreach via Microsoft Teams.

**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:**