

**POSITION DUTY STATEMENT**

PM-0924 (REV 04/2021)

CLASSIFICATION TITLE Personnel Technician I	OFFICE/BRANCH/SECTION D4 Human Resources/ Office of Statewide Liaison Services	
WORKING TITLE Transactions Liaison	POSITION NUMBER 702-008-5160	EFFECTIVE DATE

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

**GENERAL STATEMENT:**

Under the supervision of the Branch Chief, a Staff Services Manager I in the Division of Human Resources, the District Transactions Liaison serves as the liaison for personnel/payroll issues between district office employees and the Division of Human Resources, Office of Transactions Services and Records, and Office of Hiring and Examination Services; disseminates personnel/payroll information and receives and distributes personnel-related documents to designated staff. Provides support to the District staff in the areas of pay, benefits, and examinations. As appropriate, provides assistance or refers employee questions and/or problems pertaining to a variety of personnel-related issues to the Human Resources Division (Headquarters) or the District Human Resources Liaison. The District Transactions Liaison demonstrates a positive attitude, a commitment to providing quality service that is accurate, timely and exceeds our customers' expectations, and maintains complete confidentiality.

**CORE COMPETENCIES:**

As a Personnel Technician I, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Reliability**: Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Conflict Management**: Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Cultivate Excellence - Engagement, Equity, Integrity, Pride)
- **Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence - Engagement, Equity, Integrity, Pride)
- **Customer Focus**: Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement, Equity, Integrity, Pride)
- **Communication**: Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Cultivate Excellence - Engagement, Equity, Integrity, Pride)
- **Planning and Results Oriented**: Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Computer literacy and application**: Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Cultivate Excellence - Engagement, Equity, Integrity, Pride)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	

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35%	E	Provides support to employees, supervisors, and managers in responding to questions related to benefits, pay and leave balances, retirement, and any other benefit-related personnel matter. Performs the necessary research required to resolve questions on these issues. If necessary, refers technical questions to the Human Resources Division (HQ) or the District Human Resources Liaison. Ensures that all personnel documents (i.e., health, dental, vision, etc.) are completed accurately and submitted to the assigned Personnel Specialist by no later than the following business day from the date the document was received. Assists employees with the completion of necessary forms, answers questions pertaining to forms, benefits, and payroll, and provides information on all benefit-related programs available to State employees.
35%	E	The District Transactions Liaison (DTL) works closely with the Classification & Hiring Analyst and hiring division to process pre-employment documents, which includes sending out Conditional and Final job offer letters and review/approve pre-employment medical evaluations. In the absence of the D4 SSA, the DTL will schedule and conduct New Employee Orientations for new hires. The DTL will send completed new hire documents to HQ Transactions Unit for processing. All information pertaining to hiring documents will be kept confidential and is the responsibility of the DTL to ensure that new employees present the proper documents permitting them to secure legal employment with the State of California.
10%	E	On behalf of District employees, coordinates with HQ the access and review of an employee's Official Personnel File (OPF). Responsible for the receipt, security, and destruction of confidential information in accordance with established procedures.
10%	E	Provides brochures and appropriate forms for various personnel pay and benefit programs. May track a variety of personnel-related documents. As necessary may order benefit publications and miscellaneous forms. As a representative of the Department and Division of Human Resources, attends job fairs as needed. On an annual basis, the DTL facilitates the District Health Fair which requires securing approval from district management and contacting various vendors to participate in distributing health-related information to district employees.
5%	E	Provides support to the Headquarters Examination Program by coordinating local exams. By securing rooms/facilities needed and serving as an Assistant Proctor or receptionist. The DTL distributes and posts examination bulletins in HR Office and throughout the District Office when necessary. May be required to communicate with the public regarding the examination process. The DTL is expected to comply with all written guidelines and procedures set forth by the Exam Unit regarding the administration and security of exams.
5%	M	As directed by either the Branch Chief and/or the District Human Resources Liaison, serves Notices of Adverse Action either in person or by mail in accordance with Department guidelines. The District Transactions Liaison is expected to provide assistance with coverage to other district offices when necessary, and may assist with special projects and/or other duties as assigned.

<sup>1</sup>ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

**SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS**

NONE

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

The District Transactions Liaison (DTL) must have knowledge of basic grammar, spelling, punctuation, and modern English usage. The incumbent must have the ability to interpret and edit written material; write effectively; analyze written and numerical data accurately, and follow oral and written instructions. In addition, s/he must have the ability to express ideas in a clear, concise manner either orally or in writing. Knowledge of various personnel-related principles and practices, and examination policies and procedures is essential. The incumbent must possess the ability to accept increasing responsibility and complete all tasks/ assignments accurately and thoroughly; develop and maintain cooperative working relationships with all levels of staff; and be able to apply a plan of action in evaluating situations. The incumbent should have basic computer skills and be familiar with Lotus Notes and the Internet. It is essential that the DTL be able to maintain confidentiality, skillfully organize and maintain different types of information, and accurately manage multiple tasks and handle time sensitive material within designated timeframes. As a member of the Division of Human Resources (DHR), all employees are expected to remain flexible and be willing to adjust work schedules as needed in order to meet operational needs.

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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The DTL, under direction of the supervisor, is responsible for communicating accurate information to employees regarding pay and benefits, as well as assisting them submit the appropriate documents. Erroneous information and/or untimely submission of documents could result in the loss and/or delay of an employee's pay and/or benefits. Failure to provide proper information to employees could result in financial liability and/or discredit to the department and division. The DTL must ensure that accurate and timely information is communicated at all times to district employees so that they can make informed decisions regarding their pay and benefits. Erroneous decision making in the examination process could result in compromising the integrity of the exam, as well as create a financial liability and/or discredit to the department and division.

The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect departmental employees' confidential information may damage the Division of Human Resources (DHR) reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

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### PUBLIC AND INTERNAL CONTACTS

The DTL will confer with all levels of Caltrans management and staff at the District and Headquarters level, as well as members of the general public. S/he may also consult with staff from various control agencies for guidance and/or assistance.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The DTL may be required to sit for long periods of time, using a keyboard, mouse, and video display terminal. In addition, there may be instances that require prolonged standing. At times, the DTL may be required to move boxes of training materials, examination materials, supplies, printouts and/or other boxes of personnel documents. The DTL may be required to discuss highly sensitive and emotional issues with employees on a regular basis or in the case of a deceased or seriously ill employee, s/he may be required to console and advise employee's family members during difficult, emotional times. The DTL will be required to deal with a high volume of paperwork and handle a number of multi-tasking assignments, which will require meeting multiple deadlines in order to complete the requirements of the job efficiently and effectively. The DTL will also be required to prioritize work assignments while under high levels of stress and/or pressure.

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### WORK ENVIRONMENT

While at the base of operation, employees will work in a climate-controlled office at workstations within cubicles under artificial lighting. Incumbent may also be required to travel between District Offices and/or Headquarters, and work outdoors where s/he may be exposed to dirt, noise, uneven surfaces, and/or extreme cold or heat.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

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EMPLOYEE (Print)

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EMPLOYEE (Signature)

DATE

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE

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