

POSITION DUTY STATEMENT

PM-0924 (REV 12/2020)

CLASSIFICATION TITLE Senior Personnel Specialist	OFFICE/BRANCH/SECTION Office of Transactions Services	
WORKING TITLE Senior Personnel Specialist	POSITION NUMBER 702-008-1317-924	EFFECTIVE DATE

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the general direction of a Branch Chief, the Senior Personnel Specialist (Sr. PS) is responsible for a portion of the Office of Transactions Services (OTS) program. The Sr. PS acts in a lead capacity providing training, guidance, assistance, technical expertise and support to Personnel Specialists (PS), employees and managers in personnel matters in a variety of payroll services and personnel transactions work. This includes areas of appointments; separations; payroll-related matters; implementation of collective bargaining provisions; health, dental, vision, life, flex, deferred compensation, and Consolidated Omnibus Budget Reconciliation Act (COBRA) benefits; leave accounting; disability compensation; adverse actions and salary issues. The Sr. PS demonstrates a positive attitude and a commitment to provide quality service that is accurate, timely and exceeds our customers' expectations.

CORE COMPETENCIES:

As a Senior Personnel Specialist, 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, 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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Organizational Excellence - Commitment)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Organizational Excellence - Innovation)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Organizational Excellence - Integrity)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Organizational Excellence - Innovation)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Organizational Excellence - Teamwork)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Organizational Excellence - Commitment)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Organizational Excellence - Teamwork)
- **Forward Thinking:** Anticipates the implications and consequences of situations and takes appropriate actions to be prepared for possible contingencies. Anticipates and prepares for future developments. (Organizational Excellence - Innovation)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Organizational Excellence - Integrity)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

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35%	E	Work independently and responsible for using a high degree of judgment in resolving difficult personnel problems, making independent decisions in performing a wide variety of difficult and complex duties, prioritization of workload needs and assessments in order to meet crucial deadlines. Manage multiple tasks with a high degree of diversity of expertise. Identify errors and corrects with appropriate methods. Establish and maintain cooperative working relationships with internal and external customers including supervisors and managers. Exercise good judgment to develop logical solutions to various issues. Assist with the more complex processes, such as Management Information Retrieval System (MIRS) reports, lump sum deferrals, grievances, adverse actions, settlement agreements, permanent intermittent or semi-monthly transactions, accounts receivable(s), outstanding salary advances, suspended pay transactions and Affordable Care Act System (ACAS) reports. Respond to verification of employment requests and provide employment history information to State Human Resources offices.
35%	E	In a lead capacity for the PSs, provide on-the-job training using a one-on-one approach or group setting either in-person or remotely using Webex, conference call or other online platforms. Provide guidance and direction on the interpretation and application of all pertinent laws, rules, policies, procedures and contract provisions as it relates to personnel and payroll transactions. Work with the Branch Chief(s) to establish training goals and measurable objectives; and OTS's Training and Policy Team by providing input on transaction processes. Support training and development needs while guiding and mentoring PSs to successfully learn the full range of duties and develop skills and capacity of the class. In collaboration with the supervisor review and approve PS assignments and provide feedback and recommendations to both. Serve as a subject matter expert providing technical expertise for difficult and complex transactions. Act as a resource person for staff who have questions and/or concerns relating to personnel transactions. Contact control agencies when necessary to obtain information to solve the more complex transaction problems.
15%	E	Provide assistance to the unit where needed by processing payroll, appointments, separations, and other necessary or required changes using proper procedures and policy to ensure timely and accurate keying. May need to research, interpret, coordinate and ensure compliance with various bargaining unit contracts, policies, laws, rules and instructions, such as those of the California Department of Human Resources (CalHR). Stay current on internal processes by attending training sessions and ensuring conformance to departmental and control agency direction.
10%	E	Interpret and maintain a working knowledge of laws, rules, regulations, bargaining unit contracts, and various manuals in areas affecting personnel transactions, payroll, and record keeping. Respond to internal and external inquiries on changes in policy, procedures and employee benefits. Serve as advisor for policy and procedural changes. Process benefits including review of eligibility requirements, advise employees, and process forms for health, dental, flex-elect, long term disability, COBRA, legal services, family medical leave act, direct deposit, and various other benefits.
5%	E	Participate on special projects and teams. Compile and submit information for preparation of reports. Attend training sessions.

¹ESSENTIAL 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. May function as a lead (i.e. training, workload etc.) over lower level staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of:

- laws, rules, regulations and bargaining contract provisions affecting personnel record keeping, personnel transactions, payroll and certification processes
- current office methods, procedures and equipment to ensure the efficient operation of personnel/payroll services
- basic math principles as they relate to personnel/payroll matters (e.g. salary determination, accounts receivable, etc.)
- mathematical computations using addition, subtraction, multiplication, division, etc.
- communication principles (verbal & written) to provide information relating to various personnel/payroll functions
- problem-solving techniques and processes for resolution of issues

Able to:

- understand verbal and written instructions containing technical information

ADA Notice

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- research critical transactions, recommend alternative solutions and exercise sound judgment when making decisions
 - apply time management practices to prioritize, schedule and complete work effectively
 - work on multiple tasks or parts of tasks simultaneously
 - keep work area organized; research and/or apply laws, rules, regulations, and bargaining unit contracts concerning personnel transactions
 - utilize reference materials to ensure conformity, consistency, and compliance according to laws, rules, regulations, etc.
 - be flexible in adapting to changes in priorities, assignments, and other interruptions that may impact previously established assignments
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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent must be able to make independent decisions on a regular basis related to employee payroll, leave and benefits and the Department's position on statewide transactions issues. Poor judgment or incorrect reporting of information could significantly affect employees' pay and benefits and cause considerable hardship to all levels of employees. 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 HR's 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.

PUBLIC AND INTERNAL CONTACTS

The incumbent will work with all levels of Caltrans staff, management, consultants, private sector groups, and representatives of State control agencies. The incumbent must work with others in a cooperative manner.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent must have the ability to multi-task, adapt to changes in priorities, assist in the production of completed staff work, read and understand a variety of technical documents, and effectively deal with pressure while maintaining focus and remaining professional even under adversity. The incumbent must be customer service oriented due to the opportunity for interaction with staff at all levels within the organization. The ability to work with others in a positive and cooperative manner is extremely important. The incumbent will sit for long periods of time using a keyboard and monitor and may, on occasion, assist with movement of files, boxes, or other miscellaneous office supplies which will weigh up to 10 pounds.

WORK ENVIRONMENT

In office, the incumbent will use a cubicle space in a climate-controlled office setting with artificial lighting, which may have limited viewing access to outdoors. At the direction of management, there may be a combination of telework/in-office hours. The incumbent may occasionally take transportation (car, light rail, bike, walk, or other mode of locomotion) to other State facilities for training and meetings.

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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.)

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

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

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE

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