



## PENSION PROGRAM REPRESENTATIVE, CALSTRS

*Open Spot Examination for the Following Location: SACRAMENTO (YOLO COUNTY)*

Final Filing Date: Continuous Filing

Salary: \$2,384.00 - \$3,455.00

### EQUAL EMPLOYMENT & DRUG FREE STATEMENTS

The State of California is an equal opportunity employer to all, regardless of age, color, national origin, ancestry, sex, marital status, disability (mental & physical), religious or political affiliation, age, sexual orientation, medical condition or pregnancy.

It is the objective of the State of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the laws of the state, the rules governing civil service and the special trust placed in public servants.

### REQUIRED IDENTIFICATION

Accepted applicants are required to bring either a photo identification card or two forms of signed identification to each phase of the examination.

### WHO CAN APPLY

Candidates who meet the minimum qualifications of the classification, as stated on this examination bulletin. All applicants must meet the education and/or experience requirements as stated on this examination announcement. All applications/resumes must include "to" and "from" employment dates (month/day/year), time-base, and applicable classification titles. Career Credits do not apply for this examination.

Once you have taken the examination, you may not reapply for (12) months.

### FILING INSTRUCTIONS

Applications must be submitted via the U.S. Postal Service or hand delivered to the CalSTRS Human Resources Office (hours are 8:00 AM to 5:00 PM). Applications will not be accepted via e-mail and/or fax. Standard State Application (STD 678) can be found at CalHR's website [www.jobs.ca.gov](http://www.jobs.ca.gov).

Mailing Address:	Physical Address:
CalSTRS Human Resources Attention: Classification and Selection Services Unit (Exams) P.O. Box 15275 Sacramento, CA 95851-0275	CalSTRS Attention: Classification and Selection Services Unit (Exams) 100 Waterfront Place – Lobby West Sacramento, CA 95605-2807

The testing office will accept Examination Applications (STD. Form 678) continuously and will notify and test applicants on an as needed basis.

**Submit applications only to the address indicated above. Do not submit to the California Department of Human Resources (CalHR).**

NOTE: Only applications with original signature will be accepted. Facsimiles (FAX) or emailed applications will not be accepted under any circumstances.

### SPECIAL TESTING ARRANGEMENTS

If you are an individual with a disability and need reasonable accommodation to participate in this examination, please mark the box in question #2 on the "examination application". You will be notified in writing to determine what assistance can be provided.

## REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

Applicants must meet the experience/education requirements by the cut-off date. Your signature on your application indicates that you have read and understood and do possess the qualifications required. Qualifying experience may be combined on a proportionate basis if the requirements stated below include more than one pattern and are distinguished as "Either I", or "Or II", etc. For example, candidates who possess qualifying experience amounting to 50% of the required time of Pattern I, and additional experience amounting to 50% of the required time of Pattern II, may be admitted to an examination as meeting 100% of the overall experience requirement.

## MINIMUM QUALIFICATIONS

### Either I

**Experience:** In the California state service, 12 months of experience performing clerical duties at a level of responsibility not less than that of an Office Assistant, Range A.

### Or II

**Experience:** Nine months of experience as a seasonal clerk or equivalent working for the California State Teachers' Retirement System (CalSTRS) in a retirement or member services program.

### And

**Education:** Either equivalent to completion of the 12th grade; or completion of a business school curriculum; or completion of a clerical work experience training program. (One year of general clerical work experience may be substituted for the required education.)

### Or III

**Experience:** Eighteen months of clerical experience which must include client-customer service contact involving the interpretation or explanation of policies, regulations, or procedures for a public agency or private institution, such as a bank, insurance company, credit bureau, or title company. [Academic education above the 12th grade may be substituted for one year of the required general experience on the basis of either (a) one year of general education being equivalent to three months of experience; or (b) one year of education of a business or commercial nature being equivalent to six months of experience. Students who are enrolled in the last semester or its equivalent of course work which upon completion will fulfill these requirements will be admitted to the examination, but they must submit evidence of completion before they can be considered for appointment.]

**Note:** Experience working for CalSTRS as a student assistant in a retirement or benefit program area may be applied toward Pattern II.

## POSITION DESCRIPTION

This is the entry level, developmental, and journey level for the series. As trainees, incumbents work under close supervision and within established procedures; receive training and learn benefit programs; complete simple benefit calculations; and provide assistance to higher-level specialists. Incumbents continue to learn and perform a variety of duties involving the explanation and interpretation of regulations, policies, and benefits to members and employers.

As incumbents become proficient, they work under general supervision and guidelines. Incumbents may perform the less complex benefit calculations, provide technical information to members concerning membership qualifications and benefits, and review technical documents for accuracy and completeness; provide technical information to employers; and provide technical assistance to higher-level staff. Work is subject to periodic review, and contact with the public is moderate and basically informational in nature.

At the journey level, incumbents work under general supervision. The work is subject to occasional review, therefore, the consequence of errors is significant. Incumbents perform the more difficult and complex tasks associated with retirement calculations; interview members; explain and interpret regulations, policies, and benefits; expedite cases requiring special actions for timely payment of benefits; advise employers on membership qualifications and reports of contributions; prepare reports, correspondence, charts, and graphs; contact staff at various levels in other State and local public agencies, school officials, and members by telephone, personal contact, e-mail or correspondence; and perform other related work and may be assigned to participate as member of a team.

## ELIGIBLE LIST INFORMATION

Names of successful competitors are merged onto the list in order of final scores, regardless of date. Eligibility expires after **12 months** unless the needs of the services and conditions of the list warrant a change in this period. The resulting eligible list will be used to fill vacancies in West Sacramento (Yolo County).

## SCOPE OF EXAMINATION & EXAMINATION INFORMATION

### Written Test Scope:

1. Using correct spelling, punctuation, and grammar
2. Accuracy in: Comparing pairs of names, comparing pairs of numbers, alphabetizing, and numerical ordering
3. Basic Math
4. Reading and understanding written paragraphs and following written instructions

A basic calculator will be provided for this examination. No other types of calculators will be permitted, including but not limited to: graphing, scientific, wrist watch, cell phones, and/or financial calculators.

**Written Test - Weighted 100%**

The examination will consist of a written examination weighted 100%. In order to obtain a position on the eligible list, a minimum rating of 70% must be attained. Candidates who do not appear for the written test will be disqualified. Candidates will be notified of the exact date and time approximately two weeks prior to test date.

**BACKGROUND INVESTIGATION**

Prior to employment with CalSTRS, a background investigation (BI) will be conducted. The BI consists of a personal history statement, an online BI application, and fingerprinting. The BI will check criminal and civil records and, if applicable, verify education and check driving records.

**DESIRABLE QUALIFICATIONS**

- Willingness to do detailed technical work
- Willingness and motivation to prepare for professional work through in-service training and academic course work
- Demonstrated capacity for development
- Knowledge of personal computers and/or mainframe terminal operations and methods, and familiarity with current software applications
- Commitment to improving services

**KNOWLEDGE, SKILLS, ABILITIES, & PERSONAL CHARACTERISTICS****Knowledge of:**

1. Rules, regulations, organization, and procedures of STRS
2. Current office methods, equipment, and procedures
3. Grammar, spelling, and punctuation of modern English usage
4. The principles of mathematics

**Ability to:**

1. Perform technical work
2. Interpret, apply, and effectively communicate provisions of STRS' rules, regulations, procedures, and policy
3. Follow and communicate directions
4. Evaluate situations accurately and take effective action
5. Learn and operate automated equipment
6. Perform mathematical calculations with speeds and accuracy
7. Read and write English at a level required for successful job performance
8. Understand and apply the concepts of customer service
9. Achieve quality end-products
10. Build and maintain effective working relationships
11. Effectively participate as a team member

**VETERANS PREFERENCE**

Veterans' preference credits will be granted for this examination. Effective January 1, 2014, in accordance with Government codes 18973.1 and 18973.5, as follows:

1. Any veteran, widow or widower of a veteran, or spouse of a 100 percent disabled veteran, who achieves a passing score in an entrance examination, shall be ranked in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for veteran's preference.
2. An entrance examination is defined, under the law, as any open competitive examination.
3. Veterans' Preference is not granted once a person achieves permanent civil service status.

**HOW TO APPLY FOR VETERANS PREFERENCE**

The California Department of Human Resources (CalHR) has information on how to apply for Veterans' Preference on their website at [www.jobs.ca.gov](http://www.jobs.ca.gov) and on the Application for Veterans Preference form ([CalHR 1093](#)).

**CONTACT INFORMATION**

For additional information regarding this examination, please contact CalSTRS Human Resources at (916) 414-4990.

## DISCLAIMER

Please click on the link below to review the official California Department of Human Resources (CalHR) class specification: [Pension Program Representative](#)

## GENERAL INFORMATION

**For an examination with a written feature**, it is the candidate's responsibility to contact CalSTRS four weeks after the date the application was submitted if he/she has not received a progress notice.

**For an examination without a written feature**, it is the candidate's responsibility to contact CalSTRS three weeks after the final filing date if he/she has not received his/her notice.

**If a candidate's notice** of oral interview or performance test fails to reach him/her 3 days prior to their scheduled appointment due to a verified postal error, he/she will be rescheduled upon written request.

**Examination Locations:** When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. However, locations of interviews or performance evaluations may be limited or extended as conditions warrant.

**Examination Applications are available** at [www.jobs.ca.gov](http://www.jobs.ca.gov), CalHR State Jobs Center, State Personnel Board offices, local offices of the Employment Development Department and the testing department on this job bulletin.

**If you meet the requirements** stated on this bulletin, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

**Candidates needing special testing arrangements** due to a disability must mark the appropriate box on the application and/or contact the testing department.

**General Qualifications:** Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

**Eligible Lists:** Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

**If Promotional Examinations Only:** Competition is limited to employees who have a permanent civil service appointment and military veterans that meet all the minimum qualifications. Under certain circumstances, other employees may be allowed to compete under provisions of Rules 234, 235, and 235.2. State Personnel Board Rules 233, 234, 235, 235.2, and 237 contain provisions regarding civil service status and eligibility for promotional examinations. These rules may be reviewed at departmental personnel offices, at the State Personnel Board office or [www.jobs.ca.gov](http://www.jobs.ca.gov).

**If High School Equivalence is Required:** Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.

**College Education:** The qualifications meeting the requirement "Equivalent to graduation from college" means satisfaction of the requirements for the bachelor's degree from an accredited, recognized institution of higher education. This means the applicant must show receipt of a bachelor's degree. Acceptable college course work must be from an accredited, recognized institution approved by the California Superintendent.

**Career Credits:** In open, non-promotional examinations, career credits are granted to: 1) State employees with permanent civil service status, 2) full-time employees of the state who are exempt from State civil service pursuant to the provisions of Section 4 of Article VII of the California Constitution, and who meet all qualification requirement specified by the Board and have 12 consecutive months of service in an exempt position, and 3) individuals who have served one full year in, or are graduates of, the California Conservation Corps (eligibility shall expire 24 months after graduation from the California Conservation Corps). Three points are added to the final test score of those candidates who meet the above criteria, and who are successful in the examination. Such examinations cannot be for managerial positions described in Government Code Section 3513. Competitors not currently employed in state civil service who have mandatory reinstatement rights may also be eligible for career credits, but they must explain their service status in the appropriate section of the application Form 100-678. (Section 4 of Article VII of the California Constitution is posted at the State Personnel Board, 801 Capitol Mall and Sacramento).

**TTD** is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TTD Device. California Relay Service (Telephone) for the deaf or hearing impaired. From TDD phones: 1-800- 735-2929 or from voice phone: 1-800-735-2922.

**California State Teachers' Retirement System (CalSTRS), P.O. Box 15275, Sacramento, CA 95851-0275**  
**Phone: (916) 414-4990**

Exam ID: 2STAC    This bulletin cancels and supersedes all previously issued bulletins    (Rev. AUG 2015)  
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