



**Classification: Associate Governmental Program Analyst (AGPA)**

**Working Title: Customer Service Liaison**

**Position Number: 358-221-5393-005**

**Division/Unit: Finance/Prize Payments**

**Assigned Headquarters: Sacramento HQ**

**Position Eligible for Telework (Yes/No): Yes - Office-centered.**

### **Job Description Summary**

Under the direction of the Staff Services Manager I - North, the Associate Governmental Program Analyst (AGPA) performs a variety of complex, consultative, technical, and analytical projects in customer service; procurement; record retention; policy/procedure analysis and formulation; program evaluation; training and staff development analysis in customer service; consultative services to management and others; and operational efficiency. Serves as an expert staff resource on all areas related to the validation and payment of claims for the California State Lottery (Lottery) prize payment and correspondence. This position is expected to use judgment in interpreting and applying guidelines such as regulations, policies, and procedures for application to specific business cases.

### **Job Description**

45% (Essential) Review, research, analyze and determine appropriate handling of customer service inquiries and correspondence from the public and internal Lottery partners about claims and prize payments. Assist and advise statewide Prize Payment staff in the preparation of letters and customer response. After analysis of the payment file, respond to inquiries via written correspondence, email or telephone with Lottery payees, attorney's, other government agencies, the IRS, and other divisions within the Lottery regarding issues related to claims and prizes. Review, edit and approve memos, letters and reports prepared by Prize Payments staff. Maintain the Prize Payments correspondence procedure, record retention and tracking system, and evaluate and recommend changes in reports, presentations, and updates to management.

Perform quarterly assessments of customer service issues and collaborate with the training analysts when training opportunities for a specific group or Lottery staff are identified. Serve as the primary Prize Payments contact for statewide, claim processing customer service-related questions. Develop, implement, and maintain a cross-divisional Prize Payment statical weekly update comprised of Headquarters and District offices stats. Working with Prize Payments Headquarters (PPHQ) supervisory and claims and payment staff, along with District Office Staff Service Analyst and Supervisors to Prize Payment to provide statical messaging to Lottery partners.

25% (Essential) Review, analyze and evaluate the 2nd Chance program process quarterly. Collect and analyze data and run reports to ensure the process is efficient and communication among all stakeholders is up to date. Complete final approval of all 2nd Chance claims sent to payment daily. Review required documentation attached to each claim before processing claim schedules. Reconcile unclaimed winners in collaboration with Financial Accounting and Reporting (FAR) and update the Winner Log. Collaborate with the Prize Payments SLED & Risk Management Liaison to identify and resolve problems related to the payment of



prizes to support the district office staff. Maintain and reply to emails and inquires submitted to the Prize Payment email box.

15% (Essential) Maintain supply log, procedure, record retention of invoices, and organize Prize Payments supply inventory. Evaluate and analyze supply needs approved by Statewide SSMI (North, South, HQ) and make recommendations for purchase orders; obtain quotes for supplies and/or office equipment; prepare supply requisitions; comply with procurement policies and procedures. Distribute supplies.

10% (Essential) Perform analytical assignments as directed by the Staff Services Manager I - North. Work on special projects, perform program evaluation, policy analysis and formulation, create and update procedures annually or as needed, compile written reports, make oral presentations, prepare and/or demonstrate charts or graphs from compiled data to Lottery employees. Participate as a Project Team Member or Team Lead for Finance Division.

5% (Marginal) Serve as a back up to Training AGPA approving claims released to HQ. Perform other job-related duties such as participating in division audits, maintain business continuity plan, and identify areas of improvement.

### Scope and Impact

a. Consequence of Error:

Failure to use good judgment when handling player information and providing customer service could result in information being released to unauthorized persons, incorrect player information, delay in prize payment, or incorrect information being provided to the public regarding Lottery rules and regulations. This could result in potential legal challenges for the Lottery, questions of integrity and negative publicity; all of which may result in the loss of revenue for public education.

b. Administrative Responsibility:

The AGPA is responsible for adhering to the laws, rules, policies, and procedures pertaining to civil service employees in general, and specifically to employees of the Lottery. This position requires knowledge of the Lottery rules and regulations, policies, computer systems and security procedures.

c. Supervision Exercised and Received:

a. Supervision Exercised – none.

b. Supervision Received - The AGPA receives supervision from the Staff Services Manager I- North, and general direction from the SSMI-HQ or SSMI-South when SSMI-North is out of office.

d. Personal Contacts:

The AGPA has contact with all levels of Lottery management and staff as well as representatives from other state agencies, vendors, retailers, players, and the public. This position interacts with a wide variety of people; it is critical that the incumbent maintains confidentiality and acts in accordance with the integrity and values of the CA State Lottery. Contact with some staff may be related to future business plans, gaming problems, or issues that may be of a confidential nature.

### Physical and Environmental Demands



Office-centered position. Use of typical office equipment including a copier, scanner, and computer. Occasional movement for meetings, trainings, filing or presentations.

**Working Conditions and Requirements**

- a. Schedule: Monday through Friday
- b. Travel:
- c. Other:

**Effective Date:**

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**NOTE:** The statements contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. The incumbent of this position may perform other duties (commensurate with this classification) as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or otherwise balance the workload.

**SUPERVISOR'S STATEMENT:**

- I have discussed the duties and responsibilities of the position with the employee.
- I have retained a copy of the signed duty statement.

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**Supervisor Signature**

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**Printed Name**

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**Date**

**EMPLOYEE'S STATEMENT:**

- I have discussed the duties and responsibilities of the position with my supervisor.
- I have signed and received a copy of the duty statement.
- I am able to perform the essential functions listed with or without Reasonable Accommodation.
- I understand that I may be asked to perform other duties as assigned within my current classification, including work in other functional areas as business needs require.

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**Employee Signature**

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**Printed Name**

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**Date**



### Duty Statement Instructions (Rev. 04/2023)

**NOTE:** After inserting the text/information into the duty statement, remove all "Insert Text" or "Insert Text to describe the following" prompts.

**Classification:** Enter the legal class title of the position (e.g., Office Technician (Typing), Staff Services Analyst, District Sales Representative, etc.).

**Working Title:** Enter the working title of the position if different from the legal class title.

**Position Number:** Enter the full position number assigned as shown on the department's organization chart (e.g., Agency: 358, Unit: 031, Class: 5157 (SSA), Serial: 001: [358-031-5157-001]).

**Division/Unit:** Enter the Division/Unit name where the position resides in the Lottery organization.

**Assigned Headquarters:** Enter the physical work location where the employee will work (e.g., Sacramento Headquarters, Fresno District Office (Fresno DO), Northern Distribution Center, etc.).

**Position Eligible for Telework (Yes/No):**

**Job Description Summary:** Briefly describe the overall purpose of the position, the degree of supervision received, and any supervision exercised. Should not exceed 4 sentences. Example: Under the supervision of the Staff Services Manager I, the incumbent is responsible for ...**ADD THE SUMMARY OF DUTIES TO BE PERFORMED.**

**NOTE:** To determine the level of supervision received (e.g., under direct supervision, direction, etc.), refer to the class specification or contact your C&P, Examinations Analyst.

**Job Description:** This will consist of 'Essential (E)' duties and 'Marginal (M)' duties (if applicable). Essential duties must be identified in the duty statement directly after the percentage of duties (e.g., 25% (Essential Function) Supervise analytical staff to...) Enter the percentage of time the incumbent will spend performing each group of essential and marginal functions (Example: A duty that is regarded as 5% is equivalent to approximately 2 hours of work per week OR 8 hours (one day) of work per month). **NOTE:** Percentages must be in descending order with the largest percentage of duties at the top. Percentages must not be less than 5% of time. Total of all percentages must equal 100%.

- Essential Functions – these duties are why the position exists. The employee must be able to perform the essential duties of the position with or without a reasonable accommodation. Ensure the duties assigned to the position are appropriate for the classification and group similar tasks together. Explain **WHAT** the task or duty is to be performed, **WHY** the task is being **WHAT GOAL** is being achieved, and **WHERE/WHEN** is the task done if relevant to the working conditions of the job.
- Example: **WHAT:** Meet with retailers **WHERE/WHEN:** monthly in the field at the retailer's place of business **WHY:** to determine Lottery Scratcher needs **WHAT GOAL:** and ensure supply/demand needs are met.

**NOTE: Spell out acronyms.** Typically, acronyms are created by a department for division/unit names or other works that are used frequently within the department. These acronyms are not well known throughout all departments within the State of CA or the public. Job applicants and/or new employees will not be familiar with these acronyms or understand their meaning, therefore, acronyms should be spelled out in duty statements (and Job bulletins).

- Marginal Functions – These are additional duties that are incidental or a minimum part of the job. Marginal duties must be identified in the duty statement directly after the percentage of duties (e.g., 5% (Marginal Function) Assist other unit staff with...) These duties can be redistributed among other staff. Additionally, if you list 'Other duties as assigned', you must indicate what the other duties might entail (e.g., other duties assigned such as assisting other staff as needed, or assist with special projects as assigned, etc.) This percentage must be included in all percentages which in total cannot exceed 100%. **NOTE:** Marginal Functions should be no more than 5%.

**Scope and Impact:** Describe the following:

- a. Consequences of Error: (Describe consequences to the department, division, etc., if the person did not perform the duties of the position.)
- b. Administrative Responsibility: (Describe incumbent's role, such as activities related to personnel, training, business operations, etc.)
- c. Supervision Exercised and Received: (Describe position that supervises the incumbent and classifications the incumbent supervises, or if not a supervisory classification, add 'This position does not supervise others.')
- d. Internal Personal Contacts: (List frequent internal contacts to perform their duties such as, executive staff, Lottery managers and supervisors, other Lottery division staff, etc.)

**Physical and Environmental Demands:** (Describe the physical environment of the main work location .....



## Job Description

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**Working Conditions and Requirements:** Describe the following:

- a. Schedule:
- b. Travel:
- c. Other:

**Effective Date:** Enter the effective date of the duty statement (employee appointment date).