

POSITION DUTY STATEMENT

PM-0924 (REV 04/2021)

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| CLASSIFICATION TITLE Staff Services Analyst (Gen) | OFFICE/BRANCH/SECTION WC/RA/FMLA - WC Pay & Benefits | |
| WORKING TITLE WC Claims Analyst | POSITION NUMBER 702-015-5157-xxx | EFFECTIVE DATE 10/22/2021 |

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 general direction of the Branch Chief, Office of Workers' Compensation (WC), Return to Work and Reasonable Accommodation (RA)/FMLA programs, a Staff Services Manager I in the Division of Safety and Management Services (DSMS), the Staff Services Analyst (SSA) provides administrative and analytical support for the WC Pay & Benefits Branch. The SSA has a critical role in providing employees with appropriate pay and benefits when they are unable to work due to a work-related injury/illness and supporting return to work efforts on behalf of injured employees. The SSA partners with others throughout Caltrans, as well as external partners such as adjusters at State Compensation Insurance Fund and staff at the State Controller's Office, in pursuit of these goals, demonstrating a positive attitude and a commitment to providing quality service that is accurate, timely, and exceeds customers' expectations.

CORE COMPETENCIES:

As a Staff Services Analyst (Gen), 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.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Innovation, Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence - Engagement, Integrity, Pride)
- **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. (Cultivate Excellence - Integrity, Pride)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Pride)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence - Engagement, Integrity, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement, 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, Integrity, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Innovation, Pride)
- **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. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Integrity, Pride)

TYPICAL DUTIES:

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

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| 40% | E | Interpret and apply civil service laws and rules to manage 'medical only' workers compensation claims. Gathers required documentation, conducts necessary research and analysis to determine appropriate course of action in accordance with civil service laws, rules, collective bargaining agreements (CBA), departmental policies and procedures, and State Fund procedures. Track and monitor assigned claims for timely departmental action and cost effective processing by State Fund. Review and analyze medical, job, and other relevant information, and recommend best course of action in the application of Caltrans' policies on return to work and reasonable accommodation in a manner consistent with applicable laws, rules, statutes and regulations, including specific case law, set forth by the State Personnel Board (SPB), Department of Fair Employment and Housing (DFEH), and the Equal Employment Opportunity Commission (EEOC). Consult and coordinate with managers/supervisors regarding medical restrictions, the reasonable accommodation interactive process and temporary modified/alternate work assignments to promote early return to work for injured workers. Apply case management principles and practices to accurately document and maintain claim records in electronic files and claim management database. Work closely with State Fund regarding claim-related matters. Initiate and direct investigations relating to sensitive issues involving assigned workers' compensation claims. Analyze and evaluate claim, medical, return to work, and other relevant factors to define and authorize settlement parameters on assigned claims, up to authority level. Prepare and present written analyses and recommendations to management for approval of claim settlements in excess of authority level. Facilitate timely transfer of claims to the Return to Work or RA/FMLA Coordinator as appropriate. Comply with continuing education requirements in accordance with the State Fund Master Agreement. Provides witness testimony in administrative hearing and legal proceedings as necessary. |
| 40% | E | Process personnel and payroll documents related to WC pay and benefits for assigned claims utilizing the State Controller's on-line automated systems; perform difficult mathematical calculations; establish and monitors accounts receivables or collection of monies owed the department; verifies accuracy and authorizes releases of payroll; calculate and prepare salary advances when appropriate. Input and correct data in various computerized systems including, but not limited to, CLAS, MyCalPERS, and Staff Central. Advise supervisors and employees regarding WC benefits; Communicates, updates, and provides employee status to Personnel Specialist and supervisors. Serve as a liaison between employees and control agencies (i.e. SCO, CalHR, SPB, CalPERS, State Fund, etc.). Attend training sessions as required. Provides witness testimony in administrative hearing and legal proceedings as necessary. |
| 10% | E | Review and analyze CalHR and/or SCO personnel and pay letters and CBA to implement mass update and/or other special projects in response to CBA changes. Assist with the planning, oversight, and reporting responsibilities of mass update and/or other special projects as needed. Review, analyze, interpret and/or apply appropriate laws, rules, regulations, and policies to develop and maintain internal procedure manuals consistent with current laws, rules, regulations and policies pertaining to the administration of WC claims, pay and/or benefits. |
| 5% | E | Assist with researching and analyzing complex payroll and benefit issues to identify and implement appropriate solutions. Assist with researching, analyzing, and responding to Labor Commissioner complaints and/or Labor Relations inquiries. Perform periodic payroll audits and analyze results to evaluate for compliance with current laws, rules, regulations and policies pertaining to the administration of WC pay and/or benefits and/or identify problems with internal process; recommend and/or implement solutions. Research and respond to management requests for information. |
| 5% | M | Gather, maintain, analyze, and reconcile accurate statistical data related to WC claims and payroll/benefit administration in an effort to identify areas needing attention, provide reports to management, prepare presentations, and/or to determine department training needs. Prepare and present data in periodic written reports to management analyzing noteworthy causes, trends, and/or effects, including the use of charts, lists, or graphs as appropriate. |

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 act in a lead capacity for special projects or over administrative support staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of and ability to interpret and apply all laws, rules, policies, and practices related to personnel operations in State government, including but not limited to workers' compensation, Americans with Disabilities Act (ADA), reasonable

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accommodation, Fair Employment and Housing Act (FEHA), Equal Employment Opportunity Commission (EEOC), State Personnel Board (SPB), CalPERS, and CalHR; State Controller's automated payroll system; MyCalPER's employer health system; Department's automated time reporting system and leave accounting system (CLAS).

Ability to reason logically, consult and advise on Workers' Compensation issues and make determinations as to the type of Workers' Compensation benefits to be processed on a case by case basis. Ability to use analytical and research techniques to solve difficult personnel problems, use good judgment, work independently, and be able to draw valid conclusions and make recommendations for the appropriate course of action. Ability to express ideas and present information clearly and logically, both orally and in writing to managers, supervisors, and employees.

Knowledge of various computer applications such as Word, Excel, Power Point, email (Outlook) and the Internet, and must be able to give oral presentations to groups of various sizes and at various levels within the Department. The WC Analyst will be expected to review and evaluate all requests from managers and supervisors, and develop technically sound alternatives that may include developing new approaches and organizational changes or revisions. They must be able to provide thorough and completed staff work on personnel related issues and meet the needs of the operational units.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Incumbent is responsible for effectively and timely processing of Workers' Compensation claims and benefits. Inaccurate or delayed reporting of information can adversely affect the delivery of benefits to injured workers. Poor judgment in monitoring, evaluating and reporting information could affect the incumbent's ability to effectively provide quality personnel and payroll-related services to internal and external customers. Poor decisions could result in the failure to properly resolve employee issues, inappropriate action(s) being taken against an employee, financial liability and/or discredit to Caltrans.

The incumbent has access to very sensitive and confidential information. Careless, accidental, or intentional disclosure of information to unauthorized persons can have far-reaching effects, which may result in civil or criminal actions against those involved.

The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting Caltrans employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect confidential information may damage the Office'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 interacts with employees at all levels within Caltrans and at other agencies. This interaction requires the ability to develop and maintain cooperative working relationships with individuals of diverse cultural background and maintain a positive attitude.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: Working for long periods of time using a computer and related accessories (e.g. keyboard and monitor, etc.). May be required to move large or cumbersome files, manuals and/or equipment from one location to another. May be required to attend off-site meetings and/or travel throughout the state. May be required to occasionally bend, stoop, and kneel; to pull or push objects; to grasp objects, to stand for long periods of time, and to twist the body or neck in a sideways motion, either seated or standing.

Mental: Sustained mental activity will be required for problem solving, analysis, and reasoning. Ability to recognize emotionally charged issues or problems and able to respond appropriately to difficult situations. Must have the ability to manage multiple ongoing cases at various stages in the WC process, adapt to changes in priorities, and complete tasks or projects on short notice.

Emotional: Must consider and respond appropriately to the needs, feelings, and capabilities of others; is tactful and treats others with respect.

WORK ENVIRONMENT

This position is eligible for hybrid telework, requiring regular in-person attendance to support operational needs and promote the development and maintaining of cooperative working relationships. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. Employees are required to commute to the headquartered location as needed to meet

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operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the employee's responsibility.

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