DUTY STATEMENT

Duty Statement for
Professional / Analytical Classifications

State Compensation Insurance Fund

Employee's Name (First, Last)	
Program Safety & Health Services	Work Unit Loss Prevention
Position's Authorized Classification (and Range) Senior Workers' Compensation Insurance Representative	Report To Loss Prevention Manager
Position Title Senior Loss Prevention Consultant	Position Serial Number ###.###
Incumbent Appointment Classification ☐ The incumbent is underfilling the position in the Select from list: classification. S/he will be given appropriate training, direction, and feedback	CBID R01 FLSA Status ☒ Covered, Work Week Group 2 ☐ Not Covered, Exempt WWG ☐ E or ☐ SE

PURPOSE/SCOPE:

Briefly describe or summarize the position's major functions. Why the position exists? Typically includes the following:

- Intent/Purpose of the position
- Degree of direction/supervision (Under what direction)
- Nature and level of the work

Example: Under direction (*degree of supervision*), perform the full range (*scope*) of varied, sensitive**, and complex** (*level of work*) analytical and consultative work necessary to effectively administer the program's _____ function (*reason for the position*).

** "Sensitive" and "Complex" should be defined

Under the general direction of the Loss Prevention Manager, provide safety and health services to policyholders/ accounts with operations that present risk conditions of mid-level complexity and difficulty** to reduce employee injury/illness potential and workers' compensation costs.

** Risks of mid-level complexity and difficulty include:

- Smaller accounts using common technology and/or engineering controls (e.g., forklift operations, farm equipment, energy control measures, compared with more sophisticated and difficult-to-evaluate technologies)
- May have multiple locations
- May have significant losses related to easily identifiable hazards and industrial operations of mid-range sophistication
- Specialized services of lesser complexity such as industrial hygiene and ergonomics services (i.e., noise dosimetry and industrial ergonomic evaluations)

Supervisor's Statement: I have discussed the duties of the position with the employee		
Supervisor's Name (Print)	Supervisor's Signature	Date
Employee's Statement: I have discussed with my supervisor the duties of the position and have received a copy		
Employee's Name (Print)	Employee's Signature	Date

Duty Statement Origination or Revision Date July 24, 2020

KEY RESULTS/ESSENTIAL FUNCTIONS: Specifically describe the 3-5 Key Results (or Essential Functions) of the position in order of their importance to achieve the purpose/scope of the position.

Each Key Result/Essential Function description should have statement(s) consisting of

1	2	3
An action verb: What is done? Define or elaborate on common vague words (e.g., "coordinates", "monitors", "assists")	The immediate object of the action	The reason for the action: Why?

In all aspects of performing the following Key Results/Essential Functions the incumbent will
- comply with the Code of Conduct and
- maintain regular and predictable attendance and/or communication availability during working hours.

The statements contained in this duty statement reflect general details as necessary to describe the principal results/functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas.

50%

1) Provide proficient knowledge and practice of Safety & Health Services to policyholders/accounts with operations that present risk conditions of mid-level complexity and difficulty**
(This is an essential function of the job.)

a) Contact assigned accounts and complete on-site visits per Safety & Health Services' policy and procedure to evaluate the safety needs of mid-level risks. If an on-site visit is not appropriate, document reason(s) via LPRO and/or other appropriate information management system
b) Conduct on-site visits on assigned accounts to evaluate workplace hazards and the safety and health competence of the policyholder using Safety & Health Services' safety scoring methodology. Evaluations will include:
i. analysis of the risk presented
ii. analysis of injury trends
iii. develop recommendations with specific actions policyholder is to take to mitigate identified risks and injury trends per Authorized Loss Prevention policy and procedure
iv. Articulate the analysis and recommendations in writing to the policyholder/ broker and within Loss Prevention's information management system
c) Manage policyholder compliance with recommendations. Provide subsequent/follow-up servicing/consultation to ensure that recommendations are implemented
i. Maintain communication to influence/encourage the policyholder to implement recommendations, based on the methodology established by Safety & Health Services
ii. Provide written and verbal instructions and advice to policyholder and/or policyholder employees on difficult and complex injury and illness prevention issues and identification and correction of safety and health hazards
iii. Report difficulties in resolving technical issues or managing policyholder compliance with recommendations to and obtain assistance as needed from Loss Prevention Engineer, Senior Loss Prevention Engineer or Loss Prevention Manager
iv. Ensure that imminent and serious hazards are corrected with appropriate urgency
d) Request specialized services necessary to address risks beyond expertise-level which may include the Loss Prevention Engineer, Senior Loss Prevention Engineer, Industrial Hygiene and/or Ergonomic services
e) Under the general direction of the Loss Prevention Engineer and/or Loss Prevention Manager conduct accident investigations for significant claim events as assigned

15%

2) Document safety services internally and externally.
(This is an essential function of the job.)

a) Document all loss prevention services provided in the appropriate information management systems with factual and objective information in a timely manner, according to Safety & Health Services' policy and procedures.

b) Send the policyholder and broker (if broker account) written correspondence clearly identifying the hazards, services provided, and provide concise recommendations made at the time of service per Safety and Health Services' policy and procedure
c) Ensure all assigned accounts have a current Risk Assessment and correspondence as appropriate, according to Safety and Health Services' policy and procedure
d) Routinely review assigned accounts for changes in status, rise in loss trends, and increase in loss frequency
e) Submit any Loss Prevention unit documentation or reports requested by management within agreed upon timelines

15%

3) Develop and maintain effective working relationships with broker business partners.
(This is an essential function of the job.)

a) Maintain contact with broker on Loss Prevention activities on their accounts as appropriate
b) Develop and collaborate with the Loss Prevention Engineer as needed to plan, develop, present and participate in safety seminars for key stakeholders (i.e., policyholders, brokers, and external organizations)

15%

4) Serve as a technical resource. Develop and maintain professional competencies.
(This is an essential function of the job.)

a) Serve as a technical resource to other peers in the Loss Prevention function, Loss Prevention Manager, Underwriting, Marketing, and related as requested.
b) Assist in the coordination of out-of-region services to ensure that safety services are provided in a timely manner as assigned by the Loss Prevention Manager.
c) Request the assistance of higher levels of expertise from Loss Prevention Engineers as appropriate
e) Maintain professional competencies by adhering to corporate and Safety and Health training policy and procedure and remaining up-to-date on current occupational safety and health information

5%

5) Participate in special projects and committees

a) Participate in special projects and committees as assigned by the Loss Prevention Manager
b) Assist in writing and reviewing safety articles and publications as assigned by the Loss Prevention Manager

100%

REQUIRED QUALIFICATIONS/COMPETENCIES (KNOWLEDGE, SKILLS/ABILITIES):

KNOWLEDGE AREAS:

Proficient knowledge of State Fund's Loss Prevention policy and procedure

Proficient understanding of various State Fund functions as they impact Loss Prevention

Working knowledge of State Fund standard software applications

Proficient knowledge of California workers' compensation and occupational safety and health laws and regulations

Maintain proficient knowledge and practice of Safety and Health Services and industry best practices

SKILLS/ABILITIES:

Skill to assess workplace injury/illness risks based on understanding of business operations to improve safety

Skill to interpret charts and graphs and mechanical relationships

Skill to interpret California laws and regulations relating to workers' compensation and occupational safety and health issues

Skill to interpret State Fund operating policy and procedure

Skill to analyze issues, interpret and apply laws/regulations and policies and procedures to proactively make and support decisions

Skill to effectively work with relate and network with other people

Skill to communicate and influence professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders"

Skill to manage multiple projects and tasks

Skill to provide internal and external training

Skill to coordinate, facilitate, and make presentations

Skill to work independently and as a team with co-workers and management to address and resolve issues

Skill to provide clear and articulate communications to internal and external stakeholders

WORK ENVIRONMENT:

Physical Requirements

Incumbent works in a telework environment and at policyholder work site locations.

Electronic data entry, frequent light lifting, bending, reaching, carrying, and telephone work; mobility to various working areas

May be expected to wear Personal Protective Equipment (PPE) such as safety goggles, hard hat, and steel-toes shoes

Occasional lifting, bending, climbing, reaching, pushing and pulling equipment

Prolonged walking and standing for up to two hours at a time

** This position is designated under the State Fund Conflict of Interest Code. The position is responsible for making or participating in the making of governmental decisions that may have a material effect on personal financial interests. The selected candidate is required to complete the Statement of Economic Interest—Form 700 within 30 days of appointment and once per year thereafter. **

Travel

Travel to and access insureds' work sites

Travel to various work sites and locations for training and/or meetings

Travel conditions may include urban and/or rural areas and could involve walking over uneven surfaces or climbing stairs

Travel may include, but not be limited to, plane, bus, van, taxi, or car

Travel may occasionally be from overnight to five days in duration

Emergency call backs

Not Applicable

Work Hours

Work hours may vary.

Will occasionally involve work in the evenings

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Position's Authorized Classification (and Range) Workers' Compensation Insurance Representative (WCIR), Range C	Report To Loss Prevention Manager
Position Title Loss Prevention Consultant	Position Serial Number ###.###
Incumbent Appointment Classification Workers Compensation Insurance Representative ☐ The incumbent is underfilling the position in the Not Applicable classification. S/he will be given appropriate training, direction, and feedback	CBID R01 FLSA Status ☒ Covered, Work Week Group 2 ☐ Not Covered, Exempt WWG ☐ E or ☐ SE

PURPOSE/SCOPE:

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** "Sensitive" and "Complex" should be defined

Under the direction of the Loss Prevention Manager, this is the entry level professional loss prevention position designed to provide safety and health services to policyholders with operations that present risk conditions of lower level complexity and difficulty to reduce employee injury and illness potential and workers compensation costs.

The incumbent will be expected to:

- Plan, evaluate, and provide quality safety services to assigned accounts
- Document safety services internally in appropriate information management system and externally via correspondence to policyholders and their brokers (if broker account)
- Manage servicing of policyholders by utilizing appropriate information management system Book of Business
- Participate in external outreach activities
- Participate in the State Fund Loss Prevention training program and complete all courses satisfactorily
- Maintain professional skill development through on-going education which is completed in a satisfactory manner

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Supervisor's Name (Print)	Supervisor's Signature	Date
Employee's Statement: I have discussed with my supervisor the duties of the position and have received a copy		
Employee's Name (Print)	Employee's Signature	Date

Duty Statement Origination or Revision Date July 24, 2020

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An action verb: What is done? Define or elaborate on common vague words (e.g., "coordinates", "monitors", "assists")	The immediate object of the action	The reason for the action: Why?

In all aspects of performing the following Key Results/Essential Functions the incumbent will
- comply with the Code of Conduct and
- maintain regular and predictable attendance and/or communication availability during working hours.

The statements contained in this duty statement reflect general details as necessary to describe the principal results/functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas.

50%

1) Provide safety and health services to policyholders/accounts with operations that present risk conditions of low level complexity and difficulty. With oversight from the Loss Prevention Manager (training, direction, and feedback), develop competencies needed to plan, evaluate, and provide safety services for policyholders/ accounts with operations that present risk conditions with increased complexity and difficulty.
(This is an essential function of the job.)

a) Contact assigned accounts and complete on-site visits per Safety and Health Services' policy and procedure to evaluate the safety needs of lower level risks. If an on-site visit is not appropriate, document reason(s) via the appropriate information management system.

b) Conduct on-site visits on newly assigned accounts to evaluate workplace hazards and the safety and health competence of the policyholder using Safety and Health Services' safety scoring methodology. Evaluations will include:
i. analysis of the risk presented and review with Loss Prevention Manager
ii. analysis of injury trends and review with Loss Prevention Manager
iii. develop recommendations with specific actions policyholder is to take to mitigate identified risks and injury trends per Authorized Loss Prevention policy and procedure. Present recommendations to the Loss Prevention Manager to ensure thoroughness and accuracy of action plans, then present to policyholders.

c) Manage policyholder compliance with recommendations. Provide subsequent/follow-up servicing/consultation to ensure that recommendations are implemented.
i. Maintain communication to influence/encourage the policyholder to implement recommendations, based on the methodology established by Safety and Health Services
ii. Provide instruction and advice to policyholder and/or policyholder employees on injury and illness prevention issues and identification and correction of safety and health hazards
iii. Report difficulties and obtain assistance as needed from Senior Loss Prevention Consultant, Loss Prevention Engineer, Senior Loss Prevention Engineer or Loss Prevention Manager
-- to resolve technical issues or managing policyholder compliance with recommendations
-- to ensure that imminent and serious hazards are corrected with appropriate urgency

d) Request specialized services necessary to address risks beyond expertise-level which may include the Senior Loss Prevention Consultant, Loss Prevention Engineer, Senior Loss Prevention Engineer, Industrial Hygiene and/ or Ergonomic services

20%

2) Document safety services internally and externally.
(This is an essential function of the job.)

a) Document all loss prevention services provided in the appropriate information management systems with factual and objective information in a timely manner, according to Safety and Health Services' policy and procedure
b) Send the policyholder and broker (if broker account) correspondence identifying the hazards, services provided, and recommendations made at the time of service per Safety and Health Services' policy and procedure
c) Ensure all assigned accounts have a current Risk Assessment and correspondence as appropriate, according to the Safety and Health Services' policy and procedure
d) Routinely review assigned accounts for changes in status, rise in loss trends, and increase in loss frequency
e) Submit any Loss Prevention documentation or reports requested by management within agreed upon timelines

10%

3) Manage servicing of policyholders by utilizing appropriate information management system book of business.
(This is an essential function of the job.)

a) Routinely review and manage book of business to ensure Loss Prevention services are provided on a timely basis per Safety and Health Services' policy and procedure
b) Complete a Pre-Site visit form for each newly assigned account
c) Conduct on-site visit which includes completion of a Risk Assessment (do we need to add "and industry specific checklist as appropriate" here?).
d) Document all loss prevention services provided in LPRO and other appropriate information management systems with factual and objective information in a timely manner, according to Loss Prevention policy and procedure
e) Send the policyholder and broker (if broker account) correspondence identifying the hazards, services provided, and recommendations made at the time of service per Safety and Health Services' policy and procedure
f) Routinely review assigned accounts for loss trends and loss frequency to identify service needs
g) Provide safety services to those accounts identified by management for purposes of high risk surveillance or retention

5%

4) Participate in outreach activities

a) Support Loss Prevention outreach activity (i.e., Employer Seminars, Loss Prevention Safety Campaigns)
b) Participate in special projects and committees as assigned by the Loss Prevention Manager
c) Assist in writing and reviewing safety articles and publications as assigned by the Loss Prevention Manager

5%

5) Maintain professional skill development through on-going education

a) Complete all core training requirements satisfactorily within designated time frames
b) Attend on-going training provided by Safety and Health Services or external entities to ensure maintenance of technical expertise in the occupational safety and health discipline

10%

6) Bilingual Services

a) Provide bi-lingual translation services. Services may consist of, but are not limited to, translation of safety training for the public and insured policyholders, translation services for injured workers, translation of safety publications and internal requests for translation services

100%

REQUIRED QUALIFICATIONS/COMPETENCIES (KNOWLEDGE, SKILLS/ABILITIES):

KNOWLEDGE AREAS:

Working knowledge of State Fund's Loss Prevention policies and procedure

Basic understanding of various State Fund functions as they impact Loss Prevention

Working knowledge of State Fund standard software applications

General knowledge of California workers' compensation and occupational safety and health laws and regulations

SKILLS/ABILITIES:

Ability to interpret charts and graphs and mechanical relationships

Ability to interpret California laws and regulations relating to workers' compensation and occupational safety and health issues

Ability to interpret State Fund operating policy and procedure

Ability to analyze, interpret and apply laws/regulations and policies and procedures to proactively make and support decisions

Ability to effectively work with relate and network with other people

Ability to work independently under the direction of the Loss Prevention manager and as a team with co-workers to address and resolve issues

Ability to make presentations & training to policyholders

Ability to provide clear and articulate communications to internal and external stakeholders

Ability to manage multiple tasks

WORK ENVIRONMENT:

Physical Requirements

Incumbent works in a telework environment and at policyholder work site locations.

Electronic data entry, frequent light lifting, bending, reaching, carrying, and telephone work; mobility to various working areas

May be expected to wear Personal Protective Equipment (PPE) such as safety goggles, hard hat, and steel-toes shoes

Occasional lifting, bending, climbing, reaching, pushing and pulling equipment

Prolonged walking and standing for up to two hours at a time

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or participating in the making of governmental decisions that may have a material effect on personal financial interests. The selected candidate is required to complete the Statement of Economic Interest—Form 700 within 30 days of appointment and once per year thereafter. **

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Travel to and access insureds' job sites

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Travel conditions may include urban and/or rural areas and could involve walking over uneven surfaces or climbing stairs

Travel may include, but not be limited to, plane, bus, van, taxi, or car

Travel may occasionally be from overnight to five days in duration

Emergency call backs

Not Applicable

Work Hours

Work hours may vary.

Will occasionally involve work in the evenings.