DUTY STATEMENT

State Compensation Insurance Fund

Employee's Name (First, Last)	
Program Claims Medical & Regulatory Division (CMRD)	Work Unit Administration
Position's Authorized Classification (and Range) Associate Governmental Program Analyst	Report To CEA
Position Title Program Associate Administrative Analyst	Position Serial Number
Incumbent Appointment Classification (and Range)	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 direction of the CEA, the Associate Governmental Program Analyst (AGPA) will provide independent analysis, coordination/partnership, facilitation, and operational support for the program/Program Manager or Executive Leader in a variety of administrative areas including:
1. Information Analysis for Management Reporting and Decision Support: Information/data analysis, management, and reporting of key performance/predictive metrics for decision/support toward achieving program/enterprise strategic objectives. Initiate and conduct research and analysis, develop reports and recommendations, and implement as appropriate to address/improve the program's effectiveness and efficiency.
2. Budget Liaison/Coordinator in the Budget Planning Process.
3. Liaison between the program and (Corporate Support) programs and any external stakeholders to expedite/enable timely responses and follow-up concerning resources for the program's staff, to ensure compliance with corporate and audit requirements, and to provide information and address/answer questions.
4. Administrator of the program's financial transactions and expense accounting.
5. Maintain current knowledge (keep abreast) of State Fund corporate developments, policies, and procedures.

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 November 20, 2025

<u>KEY RESULTS/ESSENTIAL FUNCTIONS</u>: 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.

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

1	2	3
An <u>action verb</u>: What is done? Define or elaborate on common vague words (e.g., "coordinates", "monitors", "assists")	The immediate <u>object</u> of the action	The <u>reason</u> 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.
<u>30%</u>

1) Information Analysis for Management Reporting and Decision-Support: Information/data analysis, management, and reporting of key performance/predictive metrics for decision-support toward achieving program/enterprise strategic objectives. Initiate and conduct research and analysis, develop reports and recommendations, and implement as appropriate to address/improve the program's effectiveness and efficiency
(This is an essential function of the job)

   1. Create (compile, format, reorganize data), generate, and maintain management reports as requested/required to measure key performance/predictive metrics using database software. Analyze reports/results, identify and report trends/issues/inefficiencies/opportunities, and develop appropriate recommendations (e.g., new technologies, systems, procedures, workflows)

   2. Initiate and conduct research/analysis/studies and lead projects to address the program's operational and management issues. Develop recommended solutions/alternatives, and implement as appropriate or directed.

   a. Define/determine the issues/problem/project and resources, stakeholders, timeframes, and parameters
   b. Conduct research and data analysis and maintain documentation
   c. Develop defensible recommendations, alternatives, and/or solutions, including fiscal, organizational, staffing, and policy considerations for the program, as well as enterprise impact
   d. Prepare written reports and presentations
   e. Implement as appropriate or directed.
   i. Develop procedures, policies, workflows, forms, benchmarks, new approaches, etc. as appropriate
   ii. Facilitate provide communication and training as appropriate
   iii. Monitor and report implementation outcomes
   iv. Address/resolve issues and propose improvements as needed/appropriate

   3. Create, maintain/update, generate (customized, daily, weekly, monthly) reports/records/databases from various Corporate applications (e.g., Hyperion, MicroStrategy), SharePoint, Oracle Self-Service Human Resources, Claims/Field reports) to research, monitor/review and apprise appropriate program management staff for status reporting, identification, analysis, and resolution of issues/problems impacting unit operations, personnel management, and compliance requirements

<u>30%</u>

2) Budget Liaison/Coordinator in the Budget Planning Process. Coordinate/collaborate with program management to facilitate/manage the program's budget planning process and resolution of program budget issues
(This is an essential function of the job)

   1. Prepare Staffing Projection Report (formerly, Personnel Expense Analysis) and program metrics for planning

decisions

2. Create and update current and projected FTE (Full Time Equivalent) and OPEX (Operating Expenses) in Hyperion software. Reconcile Oracle Rosters. Prepare/update organization chart showing reporting relationships and span of control.

3. Coordinate/Partner with program management team to facilitate each unit's budget planning. Create expense analysis reports based on General Ledger account data and historical budget planning documents. Provide and compare prior year and actual expenses to aid operational expense projections.

4. Educate and advise program management on allocating operational expenses to the appropriate General Ledger accounts and addressing/resolving program budget issues

5. Monitor and maintain the program's operating budget and expenses against Hyperion, OPEX and FTE reports. Provide analysis and recommend appropriate corrective action as needed

6. Monitor and maintain changes to budget plan documents (e.g., roster, Salary Allocation Report, organization charts, supervisory changes) and correct discrepancies/changes with the appropriate program unit

7. Ensure the timely submission of salary and operating expense budgets to Corporate Planning

8. Review Performance-to-Plan reports, research and analyze causes for (FTE and OPEX) variances between budget and actual spending, and propose mitigation plan to minimize or correct variance going forward

9. Coordinate the program's reconciliation and resolution of position control to facilitate the program's staffing/hiring

a. Monitor changes to Budget Plan documents resulting from program reorganization and (new) position (re)classification
b. Coordinate resolution of discrepancies in authorized (budgeted) positions in consultation with program supervisors/managers and HR Operations
c. Amend/update Budget Plan documents as needed

20%

3) Liaison between the program and (Corporate Support) programs (including IT, REM, Financial Operations, HR Operations, Business Services, Internal Audit, Privacy and Governance, Records Management Office) and any external stakeholders to expedite/enable timely responses and follow-up concerning resources for the program's staff (e.g., technology/systems, physical resources/equipment, personnel), to ensure compliance with corporate and audit requirements, and to provide information and address/answer issues/questions. Serve on Corporate committees as assigned.
(This is an essential function of the job)

1. Collaborate with program management to gather, evaluate, and appropriately respond to information requirements/requests according to Corporate program parameters

2. Act as liaison/coordinator between program staff and IT to communicate and expedite timely responses and compliance with Access Management and Control (AMC) reporting, IT procedures (e.g., employee transfers), troubleshooting and (equipment and software) service requests

3. Periodically review and maintain/update the program's Business Continuity Plan as directed

4. Coordinate with program management to ensure that staff meets training and reporting compliance requirements (e.g., Statement of Economic Interests, Code of Conduct, Sexual Harassment)

5. Coordinate (Participate in) program activities/events (e.g., Safety Committee, Employee Orientation, Corporate Recognition)

6. Create and maintain the program's intranet website content

7. Manage logistics for program management and staff meetings (i.e., scheduling, room, presentation equipment and slide deck, facilitate Zoom/Teams as needed)

15%

4) Administrator of the program's financial transactions and expense accounting
(This is an essential function of the job)

1. Evaluate, process and track invoice payments and purchase orders and Corporate Purchasing Card (P-Card) transactions according to Corporate policies and procedures. Verify P-Card holder transactions. Determine expense allocation to the appropriate ledger account

2. Order specialized and ergonomic equipment, books, and subscriptions and track/allocate to appropriate ledger account

5%

5) Maintain current knowledge (keep abreast) of State Fund corporate developments, policies, and procedures affecting program management and staff operations to initiate and effectively perform administrative responsibilities and serve as a resource to program management and staff

100%

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

KNOWLEDGE AREAS:

1. Proficient knowledge of the State Fund organization and business functions, and Regional Office and corporate support programs (their functions and relationships); general knowledge of the terminology, acronyms, and resources available from State Fund's programs that can be leveraged to perform duties

2. Proficient knowledge of State Fund's budget planning process, including State Fund Operating Expense procedures, General Ledger, cost center allocations, and invoice payment processes. Working knowledge of basic accounting principles

3. Proficient knowledge of State Fund standard software applications (e.g., Hyperion), Oracle including IP (Procurement) and HR applications, Word, Excel, Visio, PowerPoint, Access)

4. Working knowledge of Corporate Policies and Procedures, general management, human resource principles and practices, collective bargaining agreements

5. Working knowledge of library and internet research and data gathering methods to access relevant information from journals, research publications, and online resources

6. Working knowledge of workers' compensation industry trends and issues

7. Working knowledge of project management principles

8. Working knowledge of basic math and statistics

SKILLS/ABILITIES:

9. Skill/Ability to analyze issues and situations, interpret and apply laws/regulations/procedures/policies and to proactively make and support decisions, alternatives and recommendations

10. Skill/Ability to research, analyze, and evaluate data/information

11. Skill/Ability to prepare clear, complete and concise reports using State Fund software applications

12. Skill/Ability to communicate professionally and effectively verbally and in writing with all levels of management, employees and vendors, including the ability to negotiate credibly, persuasively, and diplomatically

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

14. Skill/Ability to effectively work and relate with other people

15. Skill/Ability to work on multiple projects

16. Skill/Ability to make presentations

17. Skill/Ability to gain and maintain the confidence and cooperation of others

18. Skill/Ability to develop and effectively utilize all available resources

WORK ENVIRONMENT:

Physical Requirements

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

Incumbent works in the usual office environment.

Travel

Travel may be required.

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

Emergency call backs

Not Applicable

Work Hours

Maintain a work schedule that supports operational needs