DUTY STATEMENT
State Compensation Insurance Fund

Employee's Name:	

Program: Claims Legal	**Work Unit:** Special Projects
Position's Authorized Classification (and Range): Attorney IV	**Report To**: Assistant Chief Counsel
Position Title: Claims / Legal Technology Attorney	**Position Serial #:**
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.	**CBID:** R02
	FLSA Status: ☐ Covered, Work Week Group 2 ☒ Not Covered, Exempt WWG ☐ E or ☒ SE

PURPOSE/SCOPE:

Under the general direction of the Assistant Chief Counsel (ACC), the Attorney IV works on the more complex Legal technology projects, serving as a subject matter expert, project lead related to the integration of Artificial Intelligence (AI) into Legal applications and processes, and backup/delegate for the ACC and Attorney V as requested. The incumbent works well with teams, and operates with a high degree of independence, focusing on the tactical execution of AI technology projects and how it impacts the execution of the legal department's processes, identifying automation opportunities in relation to existing legal processes, and ensuring all technical enhancements meet rigorous legal and departmental standards. The Attorney IV will apply their knowledge of the legal department's internal procedures and functions, and how AI can be incorporated into those areas that impact the legal department.

** The Attorney IV is expected to work primarily on Artificial Intelligence (AI), automation initiatives in addition to the more complex, sensitive, and difficult technology assignments, which consist of features including, but not limited to, the following:

- Identifying and recommending technology tools and enhancements to Senior Legal Leadership that impact the execution of legal internal processes and existing applications/software.
- Participation in development and project management meetings.
- Development of project briefs and business requirement documents related to AI and the legal department's internal procedures, legal document automation, and systems improvements.
- Coordinate training and testing related to technology projects.
- High to very high impact to the California business environment (employers, employees, the workers' compensation system).
- High to very high political and media impact, implications, or sensitivity.
- High to very high potential dollar amount of the transaction or risk.
- Handle the majority of individual assignment with high to very high potential exposure to State Fund.
- Lead/participate on "project" type work related to AI, automation, and system improvements that impact the legal department's processes/procedures.
- Precedent setting exposure where there is a possibility of high to very high impact on State Fund.
- High level of novelty and high industry focus on legal issue(s) involved (new or unsettled points of law).
- High amount of time/resources needed to litigate (a reflection of the above factors) with a high degree of independence and broad discretion allowed by the Legal department and under minimal supervision.

Supervisor's Statement: I have discussed the duties of the position with the employee		
Supervisor's Name (Print):	Supervisor's Signature:	Date:

Duty Statement Origination or Revision Date: January 20, 2026

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:

KEY RESULTS/ESSENTIAL FUNCTIONS:

In all aspects of performing the Key Results/Essential Functions, the incumbent will:
- Comply with the Code of Conduct.
- Maintain regular and predictable attendance and/or communication availability during working hours.
- Maintain a safe work environment.
- Defend State Fund against fraudulent activities.
- Maintain good customer relationships with internal and external business partners and stakeholders.
- Properly maintain assigned equipment.
- Handle assignments with diplomacy and sensitivity.
- Maintain required confidentiality.
- Handle coordination of assignments involving multiple issues or initiatives
- Maintain a high-performance culture through effective communication, performance management and talent management.
- Advise and counsel legal units, Claims and internal business partners.
- Provide quality customer service in a timely manner.
- Maintain a high level of professional standards and deportment with the State Fund, its insureds, its clients, and the legal community.

The statements contained in this duty statement reflect the 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 or specific functional areas.

30%
1. Provide Legal Technology, AI and Automation Expertise. (This is an essential function of the job)

a. Serve as a subject matter expert on the integration of automation, AI, and other technology tools that impact the legal department, for Claims Legal. Lead the delivery of project objectives within the agreed upon time, scope, and budget.
   i. Lead and support the legal aspects of AI and automation initiatives, leveraging in-depth knowledge of the Legal department's internal processes, procedures, and applications, and collaborating with cross-functional teams at the direction of legal management. Effectively handle multiple projects and priorities within appropriate time frames while maintaining a high level of performance.
   ii. Implement and carry out responsibilities necessary for effective and efficient administration of assigned functions through formulation of expert legal opinions in a broad variety cases and advice related to AI and automation on matters that are more complex, sensitive, and difficult. Lead and direct litigation teams and work with other attorneys and internal business partners as needed.
   iii. Assist Legal Management in implementing uniform AI and automation Legal Management procedures, case processing, electronic or digital legal business processes, and case handling metrics.

   iv. Identify, recommend, and lead the legal evaluation and governance of AI and automation technology-related improvements to operational systems, processes, and

policies based on in-depth knowledge of the Legal department's internal processes, procedures, and applications.

    v.   Demonstrate and deliver AI and automation commitment that impact the legal department's existing applications and processes, to a high performance by maintaining substantive legal knowledge and developing and maintaining leadership competencies and technical skills.

    vi.   Gather and assemble AI and automation technology-related data and reports related to legal's processes, to support excellence in decision-making and operations.

    vii.   Keep abreast of industry trends and emerging issues, and make timely decisions and recommendations, taking into account available data, goals, constraints, and risks.

30%
2.   Provide project Leadership and Business Requirements Development. (This is an essential function of the job)

    a. Utilizing knowledge of the legal department's processes and functionalities, lead or co-lead the legal workstream for technology initiatives, providing legal guidance while working independently or collaboratively.
    b. Draft required project documents, functional requirements, workflows, and process maps in collaboration with legal staff, Business Technology, and IT partners.
    c. Present recommendations to Legal Leadership and Enterprise Steering Committee, as required.
    d. Coordinate with stakeholders including but not limited to, Enterprise Procurement, Claims Business Technology and vendors to support solution selection, contracting, and implementation activities.
    e. Track project milestones, risks, and deliverables, escalating issues as appropriate.
    f. Collaborate with the Legal Projects team, State Fund AI Business Partners, and other stakeholders to achieve expected outcomes.

15%
3.   Serve as a Legal Advisor to Leadership. (This is an essential function of the job)

    a. Remain abreast of current and emerging risks and legal issues relating to AI and automation.
    b. Advise Legal Leadership on risks and compliance with State Bar requirements, applicable laws, policies, procedures impacting technology and innovation initiatives.
    c. Prepare legal memoranda, guidance documents, and recommendations for senior decision-makers.
    d. Support the Attorney V in developing department-wide standards, policies, and governance frameworks.

15%
4.   Lead change management, training, and communication for projects. (This is an essential function of the job)

  a. Apply change management principles to support adoption of new legal technologies and tools.
  b. Draft legal department communications, user guidance, FAQs, and training materials related to technology rollouts.
  c. Serve as a legal liaison with Business Technology, AI partners, and other internal stakeholders to address user concerns and feedback.

10%
5. Backup and Acting Lead Responsibilities. (This is an essential function of the job)

  a. Represent Claims Legal in meetings and work groups.
  b. Serve as backup and/or delegate for the Attorney V and ACC, assuming project leadership and advisory responsibilities as assigned.

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100%

<u>REQUIRED QUALIFICATIONS/COMPETENCIES (KNOWLEDGE, SKILLS/ABILITIES):</u>

KNOWLEDGE AREAS:

- Proficient knowledge of Departmental goals, policies, and procedures and organizational structure to ensure efficient delivery of legal advice and effective presentation of legal analysis.
- Proficient knowledge of legal terms and forms in common use to ensure effective communication and performance of job duties.
- Mastery of legal research methods, workers' compensation statutory and case law, court procedures, administrative law, rules of evidence and procedure to ensure accurate advice and recommendations, effective presentations and/or representation of State Fund, and the reduction of risk.
- Proficient knowledge of project management.
- Working knowledge of State Fund's computer-based technology.

SKILLS/ABILITIES:
- Skill to adapt to plans and schedules to meet changing priorities of work objectives, personnel, resources, and/or workload demands.
- Skill to anticipate consequences of present decisions and courses of action.
- Skill to resolve CARE system issues by planning and implementing measures to improve CARE system performance.
- Skill to introduce changes in the program in a positive manner to gain buy-in from employees and to ensure assigned operation runs smoothly.
- Skill to conduct meetings with staff to communicate information that is necessary.
- Ability to be flexible in adapting to changes in priorities, work assignments, and other interruptions to effectively respond to demanding situations and to complete projects or assignments effectively.
- Ability to maintain high ethical standards in completing all assignments to maintain integrity of State Fund and build trusting relationship with staff.
- Ability to use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Ability to work on multiple projects and assignments simultaneously to complete projects or assignments effectively.
- Ability to work independently without direct assistance on various aspects of the job.
- Skill to provide training to internal and external customers and stakeholders.
- Skill to work effectively with State Fund software applications and computer systems.
- Skill to develop innovative solutions and strategies.
- Skill to work with high attention to detail and excellent analytical skill.
- To maintain a high level of discretion while dealing with sensitive and confidential material.

WORK ENVIRONMENT

PHYSICAL REQUIREMENTS

- Computer data entry, frequent light lifting, bending, reaching, carrying, and telephone work; mobility to various working areas.
- Occasional lifting up to 20lbs.

TRAVEL

- Travel as necessary to fulfill duties as described.
- Travel may occasionally be from overnight to five days in duration.

EMERGENCY CALLS

- N/A

WORK HOURS

- Employees are expected to work all hours necessary to accomplish their assignments and fulfill their responsibilities. Employees will normally average forty (40) hours of work per week including paid leave; however, work weeks of a longer duration may occasionally be necessary. Employees are responsible for keeping management reasonably apprised of their schedules and whereabouts.