

**ESSENTIAL FUNCTIONS DUTY STATEMENT**

HRM-025

<b>Classification Title:</b> Supervising Program Technician III	<b>Branch/Division/Bureau:</b> Administration & Licensing Services Branch/Licensing Services Division/Licensing and Administrative Business Bureau (LABB)
<b>Working Title:</b> Supervising Program Technician III	<b>Office/Unit /Section/Geographic Location</b> LABB / Licensing Processing Section (LPS) / Sacramento
<b>Position Number (13 Digit):</b> 413-145-9926-001	<b>Conflict of Interest Position:</b> <input checked="" type="checkbox"/> NO <input type="checkbox"/> YES
<b>Employee Name:</b>	<b>Effective Date:</b>

**BASIC FUNCTION:**

Under the general direction of the Supervisor I of the Licensing Processing Section (LPS), the Supervising Program Technician III (SPT III) is responsible for supervising Program Technician IIs and IIIs to ensure that proper procedures, rules, and regulations are followed when staff are processing license applications, renewals, and other licensing documents for several license qualification types. The SPT III is also responsible for monitoring the Licensing Hotline and production email queues. They may also respond to licensing inquiries by telephone, chat, and email, and respond to escalated inquiries. The SPT III also assists with the interpretation of the rules and regulations of the California Insurance Code and California Code of Regulations, as well as, providing technical assistance to staff. Further, the SPT III represents the Bureau on various intra-departmental task forces and special projects.

**ESSENTIAL FUNCTIONS**

- 30% Supervises all incoming applications, renewals, correspondence, and license documents and forms submitted to LPS for processing. Delegates projects and assignments to ensure work is processed in a timely manner. Logs, tracks, and assigns work to appropriate staff to ensure all work is processed in a timely manner, and that direct reports are not left idle with no work assigned. Disseminates information to staff regarding ongoing changes in procedures and system changes within the Department through the use of emails, verbal communications, procedural changes and staff meetings. Reviews and analyzes consumer inquiries routed from the Consumer Services Division and the supervisor email queue and provides appropriate responses.
- 20% Monitors the inquiry line and ensures that there is sufficient coverage to help reduce the callers' wait time. Monitors telephone behavior and addresses immediately, if

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needed. Monitors staff development and tracks staff performance. Monitors operational effectiveness, efficiency, and customer services. Intervenes in difficult situations regarding public inquiries and problems requiring analysis of file records. Determines appropriate course of action in the most difficult license issuance cases. Makes changes to license records that cannot be corrected by staff. Makes the final determination to combine or delete unnecessary records. Proofreads legal certifications prior to the Manager's or Deputy's signature. Compiles and maintains statistics and prepares reports.

- 20% Reviews duty statements with each staff to ensure that they have a clear understanding of what is expected of them. Approves and maintains attendance and other personnel records and administers attendance call-in process and the importance of being at work on time. Complete yearly evaluations and probationary reports using the performance database, written letters or verbal comments from the public and personal observations to document employee performance. Addresses work performance issues and follows the progressive disciplinary process. Ensures that employees have successfully completed the training required to perform Program Technician II or III duties. Provides additional training if needed by working with the LPS Training Analyst to ensure it is completed in a timely manner. Assists the Supervisor I with projects and assignments. Advises the Supervisor I immediately on any reasonable accommodation or other similar requests made by staff.
- 10% Coordinates with Licensing and Administrative Business Bureau (LABB) staff, as well as staff from other offices and bureaus within the Department and outside the Department. Attends management team and other staff meetings as required. Assists and advises ITD programmers of the needs and problems within LABB. Assists programmers in problem solving and establishes priorities concerning new and existing programs. Writes procedures outlining problems and solutions for updating and changing computer systems. Participates in interviewing and hiring panels for classes in the Program Technician series.
- 10% Compiles reports including, but not limited to, Five9 phone system, work status, and Sircon processing reports. Analyzes data, prepares summaries for management and, provides recommendations for work distribution to meet LPS' weekly processing goals. Researches, interprets, and applies the Insurance Code and related sections of the California Code of Regulations to be able to identify instances when insurance agents and brokers need to complete requirements and issues responses or inquiries, as appropriate.

**MARGINAL FUNCTIONS**

- 5% Assists with intake review and other work backlogs as needed. Works as Subject Matter Expert to develop examination and selection materials.

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5% Acts as a resource to programmers and assist with the development and testing of requirements for all computer submitted applications.

**WORK ENVIRONMENT OR PHYSICAL ABILITIES**

- Must be able to work in a high-rise building.
- Eligible for telework in accordance with CDIs telework policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed, however other authorized transit subsidies do exist for those who qualify
- Daily use of laptop computers, phone, copiers/scanners, general office equipment, software applications, and the internet.

**I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation.** (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety Analyst.)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

**I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.**

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name