

DUTY STATEMENT

Duty Statement for
General Classifications

State Compensation Insurance Fund

Employee's Name (First, Last)	
Program PolicyService Center	Work Unit PSC
Position's Authorized Classification (and Range) Workers' Compensation Insurance Technician	Report To Manager I, SCIF
Position Title Customer Care Advisor	Position Serial Number ###.###
Incumbent Appointment Classification (and Range)	CBID R01
	FLSA Status <input type="checkbox"/> Covered, Work Week Group 2 <input type="checkbox"/> Not Covered, Exempt WWG <input type="checkbox"/> E or <input type="checkbox"/> 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 supervision of the PolicyService Center Manager \(Manager I\), PolicyService Center Workers' Compensation Insurance Technician is responsible for:](#)

- [Processing routine and semi-complex tasks for policies with a standard premium level up to \\$49,999, in compliance with corporate underwriting and marketing advisories, guidelines and procedures.](#)
- [Providing quality customer service to policy holders, claimants, brokers, medical providers, lien claimants, the general public and internal business partners.](#)
- [Processing work received through various channels \(phone, fax, email, chat, regular mail, etc.\) within established time frames as outlined in the PolicyService Center policies and procedures.](#)
- [Work on special projects as assigned.](#)

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 [February 25, 2026](#)

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 <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.

45%

1) Coordinate, document accurate and timely responses, and provide quality customer service to policyholders and brokers, in compliance with corporate underwriting and marketing advisories.
(This is an essential function of the job)

a. Process semi-complex* tasks/servicing inquiries through various channels (phone, fax, email, regular mail, chat etc.), in compliance with corporate underwriting and marketing advisories.

*Semi-complex tasks include, but are not limited to:

- Employer Liability Limit Increases
- Location Updates (No Additions)
- Non-Causal Cancellation CE, CD, CB, CS, CT, CC and Notice of Cancellation Extensions over 30 Days Notice
- Non-G-Class Codes Changes
- Password Reset/Online Assistance
- Payroll Exposure Changes & the processing of the payroll report submissions
- BindNow Questions
- Renewal Inquiries/Auto Renewal Assistance
- Trade Name Change Corrections/Additions
- Waivers of Subrogation
- Entity Changes
- Nominal Ownership Changes
- WCIRB Queries
- Payment Plans (terms up to 4 months)
- Supercede and Replace (Causal - up to 30 days with appropriate documentation)
- Cancellation withdrawal requests (CMNP only)

b. Process routine tasks/servicing inquiries through various channels (phone, fax, email, regular mail, chat etc.), in compliance with corporate underwriting and marketing advisories.

These tasks include, but are not limited to:

- Additional Insured
- Blanket Waivers
- Certificates
- Contact Info Update
- Document Copies
- Legal Name Correction
- License Update
- Loss Runs Requests
- Mailing Address Update

- Dividend inquiries
- Unclaimed property inquiries
- Processing Payments

- c. Document servicing and maintenance activities in State Fund Online (SFO) and Policy Operations Portal (POP) Activity Log/Tab, in a timely manner.
- d. Ensure appropriate referral of safety, fraud, premium/classification issues/red flags to Special Investigation Unit, Claims, Loss Prevention, Underwriter and/or Auditing.

35%

- 2) Consult and/or work with WCIR on complex* servicing tasks/inquiries received through various channels (phone, fax, email, chat, regular mail, etc.), in compliance with corporate underwriting and marketing advisories. (This is an essential function of the job)

*Complex tasks include, but are not limited to:

- WCIRB Inquiries (if escalated, Duplicate Coverage, Legal Format, Inspection)
- Ownership Updates and AB 2883 (if escalated)
- Entity/Legal Name Change - (if escalated)
- Pricing Questions (on bills)
- Causal Cancellations C5, C6, CQ
- Agreed Payroll
- Billing Queries
- Premium Transfer Requests
- Payment Plans (terms beyond 4 months)
- Supercede and Replace (Causal - beyond 30 days without appropriate documentation)
- Cancellation withdrawal requests (complex cancellations CQ/CZ/C9)

10%

- 3) Maintain knowledge of corporate policies and procedures and effectively utilize State Fund Computer systems and programs. (This is an essential function of the job)

- a. Maintain knowledge of WISP, IRMA, SFO, QMS, POP, Outlook, Policy Imageline, GLIA (if applicable), WCIRB Connect, OCS, SNAP, OTL, Work Force Optimization, Date Aggregator, Microsoft Office computer programs, and any new programs as they become available.
- b. Promptly report telephone, computer or systems malfunction to appropriate Manager, Work Force Management, and IT Help Desk

5%

- 4) Participate in brokerage and policyholder outreach. (This is an essential function of the job)

- a. Communicate any servicing issues from brokerages and policyholders.
- b. Develop and maintain agency relationships.

5%

- 5) Special projects as assigned by Management, including side by side training and job shadowing.

- a. All special assignments will be completed on time and in the manner specified by manager or supervisor.

100%

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

KNOWLEDGE AREAS:

- Working knowledge of State Fund [underwriting, marketing] advisories, policies, and procedures
- Working knowledge of workers' compensation insurance rules and regulations
- Working knowledge of the State Fund organization, Regional Office and Corporate functions, and business policies and procedures
- Working knowledge of various State Fund functions as they impact underwriting, marketing, claims

SKILLS/ABILITIES:

- Skill/Ability to interpret/apply policies and procedures to complete assignments
- Skill/Ability to achieve results according to objectives
- Skill/Ability to manage multiple projects and tasks
- Skill/Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders"
- Skill/Ability to effectively work with and relate with other people
- Skill/Ability to manage multiple projects and tasks
- Skill/Ability to provide excellent customer service in a timely matter
- Skill/Ability to manage time for the completion of tasks and projects in a timely matter
- Skill/Ability to demonstrate and maintain a positive attitude in a challenging environment
- Skill/Ability to adapt to change in the workplace

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

Travel

- Travel may be required.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.
- Travel to various work sites and locations for training and/or meetings.

Emergency call backs

Not Applicable

Work Hours

- PolicyService Center hours of operations.
- Hours may vary do to shift realignment
- Will occasionally involve work in the evenings.