

Employee's Name (First, Last)	
Program Claims Customer Service Center	Work Unit CCSC
Position's Authorized Classification (and Range) Workers' Compensation Insurance Technician (WCIT), Range B	Report To WCIS II or Manager I
Position Title Customer Service Representative	Position Serial Number ###.###
Incumbent Appointment Classification (and Range) Workers' Compensation Insurance Technician (WCIT), Range B	CBID R01
	FLSA Status <input checked="" 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 Manager I, the Workers' Compensation Insurance Technician performs assigned duties of a semicomplex nature to provide customer service and policy maintenance to policyholders, claimants, brokers, medical providers, and the general public on (routine* and difficult**) work generated through all contact methods to the Contact Center.

In all aspects of the performance of these duties, the incumbent will:

- Participate in training to gain and maintain current knowledge of State Fund policies and procedures
- Provide quality customer service in a timely manner
- Follow the principles of State Fund's Equal Employment Opportunity (EEO) guidelines
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain regular and predictable attendance and/or communication availability during working hours

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 April 21, 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, provide, process, and document accurately and timely responses to a variety of claims and/or policy customer servicing inquiries (routine* and difficult**) received through all methods to the Claims Customer Service Center (This is an essential function of the job):
 - a. Authenticate policy and claim information to ensure privacy laws are adhered to and informational security is achieved.
 - b. Review the policy to verify policyholder information for coverage, applicable Policy Information Coverage (PIC) notes and endorsements, and CARE information for proper routing of calls to the correct program or Regional Office based upon workflow rules and responsibilities.
 - c. Utilize knowledge of the CA Labor Code, various State Fund manuals (Underwriting, Claims Reference Manual, and State Fund Policies and Procedures) as well as the respective program's responsibilities and professional judgment to assist the caller.
 - d. Achieve First Call Resolution whenever possible to assist customers at the first point of contact and avoid unnecessary call backs.
 - e. Quickly identify the customer's needs by effectively managing the call and utilize time effectively to maximize availability to assist other callers.
 - f. Provide information, resource materials, and appropriate referrals to callers.
 - g. Direct customers to State Fund's online resources, statefundca.com, and/or State Fund Online (SFO) whenever appropriate.
 - h. Document electronically, in a timely manner, new reports of claim injuries or claims activities (including completion and submission of all new claims established, and any required logs and/or spreadsheets). Properly document all contacts, including appropriate Claims Call Logs. Input complete, accurate, and detailed information when documenting contacts.
 - j. Promptly and courteously answer all incoming calls on assigned phone lines and properly assist all brokers, policyholders, claimants, and other internal/external customers with problems or questions regarding State Fund products, services, and individual accounts.
 - k. Obtain detailed claim and/or policy information and input accurately and timely through the utilization of CARE, POP or SFO. Ensure that all legislatively mandated information is obtained and documented.
 - l. When working on claims, utilize CARE to input accurate, detailed claim injury information from the reporting party (via telephone call or documents) to create an Employer Report of Occupational Injury or Illness (Form 3067), or New Employee Case Make-up Information Sheet (Form 3191).
 - m. When working on claims, review the appropriate resource for proper routing of completed first reports of injury in CARE to the correct Regional Office.
 - n. When working on claims, provide an immediate source of referrals to medical care providers for injury claims reported to State Fund.
 - q. Transfer calls appropriately to Tier II or III, other programs, or other State Fund offices. Verify caller's issue prior to transfer and follow appropriate CCCSC policies and procedures whether a warm or cold transfer is

warranted.

*Routine phone calls such as providing adjuster or policy/underwriter information, providing medical provider bill status or confirmation of benefit check information.

**Difficult phone calls such as claims reporting and escalated calls

30%

2) Maintain knowledge of State Fund corporate policies and procedures and effectively utilize State Fund's CCSC customer service systems and programs in order to meet required service levels; including administration of Integrated Voice Response System, Faxes, and other Electronic Submission Requirements (This is an essential function of the job):

- a. Attend and actively participate in all assigned training.
- b. Keep current with all published State Fund policies and procedures.
- c. Actively participate in one-on-one coaching sessions, unit and program meetings for technical improvement.
- d. Properly use the Integrated Voice Response (IVR) System to be available to answer inbound calls, faxes, and e-mails, make outbound calls, and use Internet based applications according to the prescribed procedures.
- e. Utilize general knowledge of the CA Labor Code, various State Fund manuals (Claims Reference Manual, and State Fund policies and procedures) as well as the respective programs' responsibilities and professional judgment to assist callers.
- g. Appropriately utilize the "work status" functions of the Contact Center phone system.
- h. Report and maintain statistical data as directed by the Manager/Supervisor (i.e. Mar Log, Claims Log, etc.). Input complete, accurate, and detailed information when reporting statistical data.

15%

3) Identify, document, and report all issues/trends that require coordination with other programs/offices (This is an essential function of the job)

- a. Immediately identify, document, and report to the appropriate manager or program any telephone, computer, or system errors that may affect the quality of service offered to customers. Provide recommendations, if appropriate.
- b. Immediately identify, document, and report to the appropriate manager or program any servicing issues, problems, or trends that may affect the quality of service offered to customers.
- c. Coordinate and provide recommendations to management, and the appropriate IT units regarding new procedures and workflow. Help test new technologies.
- d. Accurately input suspected fraud information into a TIP report and forward to Special Investigation Unit (SIU) timely.

10%

4) Participate in, or assist the Manager/Supervisor with special projects (This is an essential function of the job):

- a. Complete all special assignments and projects on time and in the manner specified by manager or supervisor.

5)

100%

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

KNOWLEDGE AREAS:

Basic understanding of various State Fund functions as they impact [claims, underwriting, marketing]

Working knowledge of Fraud Reporting Hotline policies and procedures
Working knowledge of State Fund standard software applications
General knowledge of the purpose and responsibilities of State Fund's various programs
General knowledge of the claims adjusting process
General knowledge of the California Labor Code

SKILLS/ABILITIES:

Ability to effectively use and maintain knowledge of State Fund standard software applications and telephone systems
Ability to establish and maintain effective working relationships and uphold principles of integrity in the workplace
Ability to discern which State Fund program is required or appropriate to assist callers
Ability to communicate professionally and effectively verbally and in writing with a variety of "stakeholders"
Ability to appropriately utilize functions of the Integrated Voice Response telephone system
Ability to communicate professionally and effectively verbally and in writing (including the ability to negotiate credibly and persuasively) with a variety of customers
Ability to effectively work with and relate with people
Ability to work as a team with co-workers to address and resolve issues
Ability to evaluate information and analyze data to support and defend decisions
Ability to manage multiple projects and tasks
Ability to remain objective when making decisions

WORK ENVIRONMENT:

Physical Requirements

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

Travel

The incumbent must be able to travel to various work sites and locations for training

Travel may occasionally be from overnight to five days in duration. Travel may occasionally be for extended periods and may include but not be limited to, plane, bus, van, taxi or car.

Emergency call backs

Not applicable.

Work Hours

This will occasionally involve work in the evening