

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Disability Insurance Specialist II	<i>Program Specialist</i>
NAME OF INCUMBENT:	POSITION NUMBER:
	280-219-9227-001
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
215 Santa Ana	<i>Click here to enter text.</i>
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Field Operations Division	Disability Insurance Program Manager II
BRANCH:	REVISION DATE:
Disability Insurance Branch	3/7/2019
Duties Based on: ☒ FT ☐ PT– Fraction _____ ☐ INT ☐ Temporary – _____ hours	
2. REQUIREMENTS OF POSITION	
Check all that apply: ☐ Conflict of Interest Filing (Form 700) Required ☐ May be Required to Work in Multiple Locations ☐ Requires DMV Pull Notice ☐ Travel May be Required ☒ Call Center/Counter Environment ☒ Requires Fingerprinting & Background Check ☐ Bilingual Fluency (<i>specify below in Description</i>) ☐ Other (<i>specify below in Description</i>)	
Description of Position Requirements: (e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.) <i>Click here to enter text.</i>	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
Summary Statement (Briefly describe the position's organizational setting and major functions): Under minimal supervision of the Disability Insurance Field Office Manager or Field Operations Division Manager, the incumbent performs the more difficult and complex technical work and analysis; may be assigned total responsibility for a specific project having regional or statewide impact; formulate policies and procedures and make recommendations to management on the full range of Disability Insurance issues, problems, and concerns, and prepare reports and correspondence in these same areas. As a technical expert in a particular program area, may act in a consulting capacity to the field and other departmental staff by providing problem-solving advice and program information; and may have regional or statewide responsibility for coordinating activities in a particular program or program area ensuring consistent application of policies, procedures, and standards. The incumbent provides support and guidance to Field Office staff as a Single Point of Contact (SPOC) for all new IT applications deployed for Field Office use. As a program specialist, may provide assistance to lower level specialists by responding to technical questions; providing feedback on assignments, and instructing them on data collection,	

information gathering and dissemination, report and correspondence preparation, and other aspects of program support work.	
Percentage of Duties	Essential Functions
40%	As a project team leader. - Develops, coordinates, tracks, and reports on projects ensuring that objectives, goals, and milestones are met. - Provides Field Office Management, Field Operations Division, and Central Office with analysis and statistical reports related to field operations and monthly production. - Acts as a subject matter expert on branch or enterprise level projects.
20%	Researches and analyzes program statistical data. - Analyzes and reports findings in written reports, graphs, charts and/or issue memo format. - Gathers information and data providing analysis and makes recommendations on which the Field Office Management bases decisions.
15%	Monitors the salary, benefits, and Operating Expenses and Equipment (OE&E) budgets by reviewing reports to ensure that offices stay within spending limits. - Prepares the Earnings and Usage Report on a monthly basis. Analyzes usage to determine existence of patterns and trends and recommends operating efficiency improvements. - Tracks, monitors, and analyzes usage of salary and benefits budgets; projects future workload and expenditures to assist manager in determining number of hours available for PI usage. - Tracks, reviews, and analyzes OE&E budget fund availability and expenditures and makes purchase recommendations. Compares expenditures to the Cost Accounting Reports and resolves differences.
10%	Serves as SPOC between the Field and Central Office, or other Department entities. - For the implementation of decisions, projects, improvement opportunity ideas, and action plans. - Performs post implementation reviews and analysis of the project goals and results. - Consults with training coordinators on office training needs. - Consults with Infrastructure Solutions & Management Division on telephone and data line requisition, communication systems maintenance, and other customer service improvement activities. - Identifies office marketing opportunities and, with marketing representative, plans marketing activities to meet office needs.
10%	Serves as SME between the Field and Central Office, or other Department entities. - For the development of business solutions, procedural modifications, manual amendments, and the deployment of Branch or enterprise solutions. - Oversees the implementation of tactical processes in the field offices and coordinates marketing activities as needed.
Percentage of Duties	Marginal Functions
5%	Performs other duties as assigned.
4. WORK ENVIRONMENT <i>(Choose all that apply)</i>	
Standing: Occasionally - activity occurs < 33% Sitting: Frequently - activity occurs 33% to 66%	

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Disability Insurance Specialist II

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Walking: Occasionally - activity occurs < 33%	Temperature: Temperature Controlled Office Environment	
Lighting: Artificial Lighting	Pushing/Pulling: Occasionally - activity occurs < 33%	
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%	
Other: <i>Click here to enter text.</i>		
Type of Environment: ☐ High Rise ☒ Cubicle ☐ Warehouse ☐ Outdoors ☐ Other:		
Interaction with Customers: ☐ Required to work in the lobby ☒ Required to work at a public counter ☒ Required to assist customers on the phone ☐ Required to assist customers in person ☐ Other:		
5. SUPERVISION EXERCISED: (List total per each classification of staff)		
N/A		
6. SIGNATURES		
Employee's Statement: <i>I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Position Statement.</i>		
Employee's Name:		
Employee's Signature:		Date:
Supervisor's Statement: <i>I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.</i>		
Supervisor's Name:		
Supervisor's Signature:		Date:
7. HRSD USE ONLY		
Classification and Pay Group (CPG) Approval		
☒ Duties meet class specification and allocation guidelines.	CPG Analyst Initials	Date Approved
☐ Exceptional allocation, STD-625 on file.	AF	8/4/2026
Reasonable Accommodation Unit use ONLY <i>(completed after appointment, if needed)</i> <i>If a Reasonable Accommodation is necessary, please complete a Request for Reasonable Accommodation (DE 8421) form and submit to Human Resource Services Division (HRSD), Reasonable Accommodation Coordinator.</i> List any Reasonable Accommodations made:		

Supervisor: After signatures are obtained, make 2 copies:

- Send a copy to HRSD (via your Attendance Clerk) to file in the employee's Official Personnel File (OPF)

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- Provide a copy to the employee
- File original in the supervisor's drop file

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Disability Insurance Specialist	<i>Program Specialist</i>
NAME OF INCUMBENT:	POSITION NUMBER:
	280-219-9218-001
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
219 Santa Ana	<i>Click here to enter text.</i>
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Field Operations Division	Disability Insurance Program Manager II
BRANCH:	REVISION DATE:
Disability Insurance Branch	<i>Click here to enter a date.</i>
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Description of Position Requirements: (e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.) <i>Click here to enter text.</i>	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
Summary Statement: (Briefly describe the position's organizational setting and major functions)	
Under close supervision of the Disability Insurance Field Office Manager or Field Operations Division Manager, the incumbent develops analytical skills; participates in policy and procedure formulation; gathers and analyzes data; consults with field and other departmental personnel in securing and disseminating necessary information; prepares reports and correspondence on technical Disability Insurance issues, problems and concerns; works on the development of guidelines, training courses, and other tools and materials to assist Disability Insurance office management in the administration of the Department's Disability Insurance program; and may serve as a specialist in analyzing performance measurements and recommending solutions to performance issues. The incumbent may be used in the field offices (FO) to act in a lead capacity and train, monitor, and advise staff on office operations.	

Percentage of Duties	Essential Functions
40%	Researches and analyzes program statistical data. • Researches and gathers information on FO operations. Reviews and analyzes data and creates reports on program activities, such as duration control, quality assurance focus reviews, program integrity, claim activity statistics, and telephone accessibility. • Assists management to designing tools and processes for tracking, documenting, and measuring progress of LDP goals. • Prepares flow charts, graphs, and spreadsheets to show current operations and claim activity trends and analyzes information to identify opportunities for process improvements. • Analyzes management reports and provides findings to manager for review. • With the FO management team, creates plans to resolve issues raised by special surveys, studies, or reviews. • Summarizes data reports and briefs FO management team on findings. • Prepares recommendations for improvements on program operations as identified through analysis of findings.
15%	Conducts special projects as assigned by the management team. • Prepares data necessary to complete and implement special projects. • Coordinates with the management team to develop and implement improvement plans and measure results. • Coordinates the completion of special surveys, such as the employee language survey and the commuter pattern survey. • Assists in the planning and maintenance of the office organizational chart. • Reviews workload reports, queues, suspense lists to assist with management of workload.
15%	Assists in monitoring the salary, benefits, and Operating Expenses and Equipment (OE&E) budgets by reviewing reports to ensure that offices stay within spending limits. • Prepares the Earnings and Usage Report on a monthly basis. Analyzes usage to determine existence of patterns and trends and recommends operating efficiency improvements. • Tracks, monitors, and analyzes usage of salary and benefits budgets; projects future workload and expenditures to assist manager in determining number of hours available for PI usage. • Tracks, reviews, and analyzes OE&E budget fund availability and expenditures and makes purchase recommendations. Compares expenditures to the Cost Accounting Reports and resolves differences.
5%	Coordinates the procurement process. • Anticipates future operational needs for forms, supplies and equipment. • Coordinates the purchase and delivery of forms and supplies. • Works with the office management team to evaluate needs and procure equipment. • Serves as Single Point of Contact (SPOC) with Fiscal Programs Division for US Postal Service fees.
5%	Assist office manager with premises plan. • Evaluates office space in relation to current and future program needs. • Prepares recommendations for maximizing space and/or acquiring additional space as needed. • With the Business Operations Planning and Support Division field representative, maintains premises in suitable operating environment.
5%	Prepares equipment and property reports. • Analyzes use of state vehicles to ensure usage meets Department requirements. • Ensures vehicle maintenance is scheduled and performed and completes auto reports. • Coordinates equipment identification for FO accountability and prepares and updates equipment inventory reports.

5%	Coordinates health and safety activities to ensure requirements are met. • Prepares and monitors the implementation of the Injury & Illness Prevention Plan. • Prepares and monitors the implementation of the Continuity Plan for Business to ensure staff safety and that DI is operational in case of disaster and/or emergency. • Utilizing program knowledge, assigns staff responsibilities for critical functions during disaster and/or emergency conditions. • Serves as Crime Prevention Coordinator and prepares crime prevention reports. • Maintains listing of FO staff trained and certified First Aid and CPR procedures.
5%	Acts as SPOC to coordinate FO needs with Central Office and Field Operations Division. • Consults with training coordinators on office training needs. • Consults with Infrastructure Solutions & Mgmt Division on telephone and data line requisition, communication systems maintenance, and other customer service improvement activities. • Identifies office marketing opportunities and with marketing representative, plans marketing activities to meet office needs.
Percentage of Duties	Marginal Functions
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Supervisor's Name:	

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Supervisor's Signature:

Date:

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