

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Analyst II	WC/RA/FMLA -- Pay and Benefits	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Senior WC Claims Analyst	702-015-5393-xxx	08/10/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the general direction of the Branch Chief, Office of Workers' Compensation (WC), Return to Work and Reasonable Accommodation (RA)/FMLA programs, a Supervisor I in the Division of Safety and Management Services (DSMS), the Senior WC Claims Analyst provides training, analytical, and administrative support to the WC Pay and Benefits Branch, demonstrating a positive attitude and a commitment to providing quality service that is accurate, timely, and exceeds our customers' expectations.

CORE COMPETENCIES:

As an Analyst II , the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
50%	E	Develop training curriculum and materials related to the processing of personnel and payroll documents related to WC pay and benefits including, but not limited to creating new and/or revising existing formal and informal training; development of learning objectives, training plans, training tools, visual aides, exercise, samples quizzes and tests, and student handbook; determining the organization, presentation, and layout of materials; development of forms and other materials as necessary for the training. Create and revises forms and templates for staff's use based upon needs, requests or suggestions. Collaborate with subject matter experts, supervisors and managers to gather training subject information and input, capture work processes and requirements, and ensure training is accurate and relevant. Research applicable laws, rules, government codes, departmental policies and procedures, control agency requirements, etc., and ensure training modules, job aides, procedures and information on intranet web pages are updated and in compliance. Report process inconsistencies, issues/concerns, and/or noncompliance with the legal requirements to management and provides input and/or recommended actions to resolve. Act as the lead trainer for staff on the processing of personnel and payroll documents related to WC pay and benefits, including providing feedback to trainees and regular progress reports to the Branch Chief. Provide training to supervisors and managers as well as staff in districts, and/or other program areas regarding their roles and responsibilities as they relate to WC-related personnel and payroll transactions.
35%	E	Research and and analyze the most complex payroll and benefit issues to identify and implement appropriate solutions. Review and analyze collective bargaining agreements (CBA) and collaborate with the Office of Labor Relations to interpret and recommend appropriate implementation options for mass update and/or other special projects in response to CBA changes. Act as lead for implementation of mass update and/or other special projects, including planning, oversight, and reporting responsibilities. Research, analyze, and respond to Labor Commissioner complaints. Research and respond to management requests for information.
10%	E	As needed for coverage purposes, process personnel and payroll documents related to WC pay and benefits for assigned claims utilizing the State Controller's Office (SCO) on-line automated systems; perform difficult mathematical calculations; establish and monitors accounts receivables or collection of monies owed the department; verifies accuracy and authorizes releases of payroll; calculate and prepare salary advances when appropriate. Input and correct data in various computerized systems, including but not limited to, CLAS, MyCalPERS, and Staff Central. Advise supervisors and employees regarding WC benefits; Communicates, updates, and provides employee status to Personnel Specialist and supervisors. Serve as a liaison between employees and control agencies (i.e. SCO, CalHR, SPB, CalPERS, State Fund, etc.). Attend training sessions as required.

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5%	M	Acts as a liaison between Service Centers, State Fund, State Controller's Office, State Personnel Board, CalPERS, and CalHR
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¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.
MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS
None; may act in a lead capacity for special projects or over administrative support staff.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Ability to perform a professional level of analytical administrative line of work with a high degree of complexity to resolve administrative problems and make recommendations for an effective course of action. Ability to reason logically and creatively. Ability to use analytical and research techniques to solve difficult personnel problems, use good judgment, work independently, and be able to draw valid conclusions and make recommendations for the appropriate course of action. Ability to express ideas and present information clearly and logically, both orally and in writing to managers, supervisors, and employees. Ability to effectively interpret and apply civil laws, rules, and regulations as well as various personnel manuals from SCO, CalPERS, CalHR, departmental procedures, and collective bargaining agreements. Ability to grasp the essence of new information and master new technical and business knowledge. Ability to adjust rapidly to new situations warranting attention and resolution. Knowledge of State Personnel Board and California Department of Human Resources laws, rules, policies, and practices; State Controller's Office automated payroll system; the Department's automated time reporting system (Staff Central); and leave accounting system. Knowledge of effective training tools and techniques and styles of learning. Knowledge of various computer applications such as Word, Excel, Power Point, email (Outlook) and the Internet, and must be able to give oral presentations to groups of various sizes and at various levels within the Department. The RA/FMLA Coordinator will be expected to review and evaluate all requests from managers and supervisors, and develop technically sound alternatives that may include developing new approaches and organizational changes or revisions. They must be able to provide thorough and completed staff work on personnel related issues and meet the needs of the operational units.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
WC-related personnel and payroll transactions. Poor judgment in monitoring, evaluating and reporting information could affect staff's ability to effectively provide quality personnel and payroll-related services to internal and external customers. The incumbent has access to very sensitive and confidential information. Careless, accidental, or intentional disclosure of information to unauthorized persons can have far-reaching effects, which may result in civil or criminal actions against those involved. The incumbent is responsible for complying with the Information Practices Act (IPA) by protecting Caltrans employees' confidential information, including, but not limited to, social security numbers, medical or employment history, education, financial transactions, or similar information. Failure to protect confidential information may damage the Office's reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

PUBLIC AND INTERNAL CONTACTS
The incumbent interacts with the public and employees at all levels within Caltrans and at other agencies. This interaction requires the ability to develop and maintain cooperative working relationships with individuals of diverse cultural background and maintain a positive attitude.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Physical: May be required to sit for long periods of time using a computer and related accessories (e.g. keyboard and monitor, etc.). May be required to move large or cumbersome files, manuals and/or equipment from one location to another. May be required to attend off-site meetings and/or travel throughout the state. May be required to occasionally bend, stoop, and kneel; to pull or push objects; to grasp objects, to stand for long periods of time, and to twist the body or neck in a sideways motion, either seated or standing.
Mental: Sustained mental activity will be required for problem solving, analysis, and reasoning. Ability to recognize emotionally charged issues or problems and able to respond appropriately to difficult situations. Must have the ability to manage multiple ongoing cases at various stages in the WC process, adapt to changes in priorities, and complete tasks or projects on short notice.
Emotional: Must consider and respond appropriately to the needs, feelings, and capabilities of others; is tactful and treats others with respect.

WORK ENVIRONMENT
The incumbent may telework regularly; when not teleworking, incumbent will work in a climate-controlled office under artificial light. There will be occasional fluctuations in building temperature. The incumbent will periodically attend meetings and/or trainings.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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