

POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Analyst II	OFFICE/BRANCH/SECTION WC, RTW, RA, FMLA	
WORKING TITLE Disability Management Coordinator (RA/FMLA)	POSITION NUMBER 702-015-5393-034	REVISION DATE 08/01/2026

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

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 Staff Services Manager I in the Division of Safety and Management Services (DSMS), the Disability Management Coordinator (Analyst II) serves as an analyst providing administrative oversight, guidance, training and analytical support for the Reasonable Accommodation/FMLA programs. The Analyst II demonstrates 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.

- **Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Cultivate Excellence - Engagement, Integrity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First - Engagement, Equity, Innovation, Integrity, Pride)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Safety First - Engagement, Equity, Innovation, Integrity, Pride)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Safety First, Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety First - Engagement, Equity, Innovation, Integrity, Pride)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety First, Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Engagement, Equity, Innovation, Integrity, Pride)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity, Pride)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

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45%	E	The Disability Management Coordinator independently advises managers and supervisors on RA and FMLA processes, provides technical guidance and assistance, and answers general questions so that issues are resolved within the time frames set forth by law. Independently reviews, analyzes, and recommends best course of action in the application of the Department's policies on RA and FMLA. Facilitates resolution of the more complex cases and issues. Ensures Department policies are consistent with the laws, rules, statutes and regulations, including specific case law, set forth by the State Personnel Board (SPB), Department of Fair Employment and Housing (DFEH), and the Equal Employment Opportunity Commission (EEOC). The Disability Management Coordinator assists with updating Department's policies and ensures policies are consistent with any changes to rules, regulations, or laws. Ensures the Department's RA Guide is updated regularly to reflect current changes. Acts as a resource and provides general direction to the District RA Liaisons on the Department's RA and FMLA processes. As needed, the Disability Management Coordinator works closely with others areas in the unit such a Workers' Compensation/Return - to - Work, Classification and Pay Unit, District RA Liaisons and/or District Safety Officers, and managers/supervisors on non-industrial reasonable accommodation requests requiring permanent reassignment to different positions. The Disability Management Coordinator communicates and coordinates with District Offices to gather information and assists with the second level appeal process. Assists with monitoring, tracking and drafting responses to appeals and/or complaints filed with the SPB, DFEH, EEOC and/or federal Department of Labor (DOL). Communicates and coordinates with relevant parties to facilitate employer-originated applications for Disability Retirement, Fitness for Duty evaluations, and FMLA-related Second- or Third- Opinions.
45%	E	The Disability Management Coordinator independently completes entire reasonable accommodation process for requests that involve telework, assisted animals or as assigned by the SSM I or SSM II. Independently reviews and analyzes documents (e.g. accommodation requests, medical certifications, etc.) to determine the best course of action in the application of Caltrans RA policies, practices, and procedures, and to promote consistency with laws, rules, and regulations. Communicates timely and in good faith with employees and management throughout the accommodation process, including facilitating interactive process discussions. Collaborates with departmental partners such as Facilities, Procurement & Contracts, Legal, Deputy District Directors of Administration, etc. to consider accommodation requests, identify potential solutions, and support implementation of accommodation decisions. Prepares notices advising employees of accommodation decisions in accordance with government code requirements. Communicates with health care providers as needed to obtain additional and/or clarifying information in accordance with regulatory requirements for medical certifications. Thoroughly documents the accommodation process in electronic files (e-files) and/or internal claims management database.
10%	M	The Disability Management Coordinator is responsible for maintaining files and compiling and analyzing statistical data related to RA/FMLA, as requested. the Disability Management Coordinator is expected to provide coverage within the unit as needed, and may assist on special projects/assignments and complete other duties as assigned.

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; however, may serve in a lead worker capacity over other staff, providing guidance and reviewing work.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The Disability Management Coordinator is knowledgeable and able to independently interpret and apply all laws, rules, policies, and practices related to personnel operations in State government, including but not limited to the Americans with Disabilities Act (ADA), Family Medical Leave Act (FMLA) and California Family Rights Act (CFRA), Reasonable Accommodation, Fair Employment and Housing Act (FEHA), and the Equal Employment Opportunity Commission (EEOC). The Disability Management Coordinator must be familiar with and have knowledge of Caltrans mission and goals, policies and procedures, and be able to apply the personnel management program needed to accomplish them. The Disability Management Coordinator must able to reason logically, 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. Additionally, s/he must be able to express ideas and present information clearly and logically, both orally and in writing to managers, supervisors, and employees.

The Disability Management Coordinator must have knowledge of various computer applications such as Word, Excel, Power

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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 Disability Management 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. Disability Management Coordinator 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

The Disability Management Coordinator makes independent decisions that may be sensitive in nature and, if necessary, require discussion with the supervisor, Legal Division, Labor Relations, Discipline Services, various Division of Human Resources programs, and other relevant program areas within Caltrans. Poor decisions could result in the failure to properly resolve employee issues, inappropriate action(s) being taken against an employee, financial liability and/or discredit to Caltrans. The Disability Management Coordinator must be able to act responsibly and research existing policies and rules prior to making any recommendation(s) on how to handle any specific issue.

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 Caltrans employees' confidential information may damage the Office of WC, RTW, and RA/FMLA 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 Disability Management Coordinator confers with all levels of management and staff in Caltrans and with employee representatives (e.g. union representatives, personal attorneys, etc.) in their daily activities. They also consult with staff from various control agencies for guidance and assistance.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit for prolonged periods of time, use a computer keyboard and monitor, and be able to develop cooperative working relationships with all customers. The incumbent may be required to move large or cumbersome manuals and/or equipment from one location to another, including training materials and/or handouts. May be required to attend off-site meetings travel throughout the state as needed.

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 RA/FMLA processes, adapt to changes in priorities, and complete tasks or projects on short notice.

The incumbent interacts with the public and employees at all levels within the Department and other agencies. This interaction requires the ability to develop and maintain cooperative working relationships with individuals of diverse cultural backgrounds.

WORK ENVIRONMENT

The incumbent may work in a hybrid telework environment that is in alignment Caltrans policies and procedures. When in the office, the incumbent will work in a climate-controlled environment under artificial light. There will be occasional fluctuations in building temperature. The incumbent will work in a cubicle and will periodically attend meetings and/or trainings. Some travel may be required, which may result in exposure to dirt, noise, uneven surfaces, and/or extreme heat or cold.

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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.)

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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CLASSIFICATION TITLE Analyst I	OFFICE/BRANCH/SECTION WC, RTW, RA/FMLA	
WORKING TITLE Disability Management Coordinator	POSITION NUMBER 702-015-5157-xxx	REVISION DATE 08/18/2026

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

GENERAL STATEMENT:

Under the supervision of the Branch Chief for the Office of Workers' Compensation (WC), Return-to-Work and Reasonable Accommodation (RA), and FMLA programs, and reporting to a Supervisor I in the Division of Safety and Management Services (DSMS), the Analyst I serves as a Disability Management Coordinator providing administrative and analytical support for the Workers' Compensation and Return-to-Work Program, as well as Reasonable Accommodation and FMLA programs. The Analyst I performs research and analysis, exercises independent judgment and discretion in interpreting and applying applicable statutes, regulations, policies, and procedures, and develops solutions and recommendations related to assigned program responsibilities. The Analyst I performs duties within the recruiting and developmental level and receives guidance on particularly complex, controversial, sensitive, or precedent-setting matters.

CORE COMPETENCIES:

As an Analyst I, 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.

- Managing Change:** Demonstrating support for organizational changes needed to improve the department's effectiveness; supporting, initiating, sponsoring and implementing change. (Equity, Employee Excellence - Collaboration, Innovation, Integrity, People First)
- Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety, Equity - Equity, Innovation, People First, Pride)
- Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Safety - Collaboration, Equity, Innovation, Integrity, Pride)
- Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Safety, Equity, Employee Excellence - Collaboration, Equity, Innovation, Integrity, People First, Pride, Stewardship)
- Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety, Equity, Employee Excellence - Collaboration, Equity, Integrity, Pride)
- Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Safety, Equity, Employee Excellence - Collaboration, Integrity, People First, Pride)
- Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Safety, Equity, Employee Excellence - Collaboration, Integrity, People First, Stewardship)
- Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Safety, Equity, Employee Excellence - Collaboration, Innovation, Integrity, Pride)
- Organizational Skills:** Keeps work prioritized and organized. Logically approaches situations. (Safety, Equity, Employee Excellence - Equity, Integrity, People First, Pride, Stewardship)

TYPICAL DUTIES:

Percentage
Essential (E)/Marginal (M)¹ Job Description

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40%	E	The Disability Management Coordinator (DMC) serves as a primary resource for Family and Medical Leave Act (FMLA)/California Family Rights Act (CFRA) inquiries and provides technical guidance and consultation to managers, supervisors, Human Resource Liaisons, and employees regarding FMLA/CFRA requirements and departmental policies and procedures. The DMC provides guidance regarding eligibility requirements, qualifying reasons for leave, required forms, medical certification requirements, designation procedures, applicable timelines, intermittent and reduced-schedule leave, recertification requirements, and other FMLA/CFRA program requirements. The DMC reviews and analyzes FMLA/CFRA requests, medical certifications, internal forms, and other relevant documentation to assess completeness and determine whether additional information, clarification, or authentication is required. The DMC evaluates information provided in medical certifications and other documentation in accordance with applicable FMLA/CFRA requirements and departmental procedures and provides guidance regarding appropriate next steps. The DMC researches, interprets, and applies applicable federal and state laws, regulations, policies, and procedures to assigned FMLA/CFRA matters. The DMC analyzes available information, identifies relevant issues, develops potential solutions, and provides recommendations regarding appropriate courses of action. The DMC responds to FMLA/CFRA inquiries and assists managers, supervisors, Human Resource Liaisons, and employees with resolving questions regarding the administration of protected leave. The DMC communicates and coordinates with appropriate stakeholders to gather information, provide guidance, conduct necessary follow-up, and support consistent application of FMLA/CFRA requirements and departmental procedures. The DMC maintains and updates FMLA/CFRA case information and related documentation in the applicable claims management system and electronic case files in accordance with departmental documentation and record keeping standards. Escalated situations may be assigned to or elevated to an Analyst II or supervisor for additional review, consultation, or direction.
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30%	E	The Disability Management Coordinator (DMC) reviews, analyzes, and processes assigned Reasonable Accommodation (RA) requests in accordance with applicable federal and state laws, rules, regulations, and departmental policies and procedures. This includes reviewing internal RA forms, medical documentation, duty statements, and other relevant information to identify functional limitations, work-related restrictions, essential job functions, and determine whether additional information or clarification is required. The DMC manages assigned RA requests involving telework and assistive animal accommodations and remains engaged from initiation through completion. The DMC researches, interprets, and applies applicable statutes, regulations, policies, and procedures; analyzes available information; identifies relevant issues; develops potential accommodation options; and provides recommendations regarding appropriate next steps. The DMC provides guidance to managers and supervisors on conducting the interactive process and facilitates interactive process discussions with employees and supervisors. The DMC gathers and evaluates relevant information, identifies potential accommodation options, documents case activity, conducts appropriate follow-up, and supports effective communication and resolution of RA requests. The DMC communicates and coordinates with employees, managers, supervisors, Human Resource Liaisons, and other appropriate stakeholders to obtain information necessary to evaluate assigned RA requests and facilitate the interactive process. The DMC maintains and updates the RA/FMLA claims management system to support accurate, timely, and complete documentation of all assigned case activity in accordance with departmental standards. Escalated situations may be assigned to or elevated to an Analyst II or supervisor for additional review, consultation, or direction.
10%	E	As needed, the DMC communicates and coordinates with District Offices to gather information, monitor and track cases, conduct case follow-up, and assist with the preparation of information related to RA/FMLA matters. The DMC may assist an Analyst II or supervisor with appeals, Fitness-for-Duty matters, second and third medical opinions, complaints, or other complex RA/FMLA matters by gathering documentation, coordinating information, conducting research, and providing other case support as assigned.
10%	E	Generates historical and statistical data reports based on information captured in the claims management system as requested by management and/or needed for audit inquiries. This includes, but is not limited to, compiling and reviewing, and analyzing statistical data related to RA/FMLA. The DMC provides coverage within the unit as needed and may assist on special projects and assignments and complete other duties assigned.
5%	E	The DMC participates in professional development, training activities, information-sharing sessions, RA and FMLA Forums, team meetings, and other program activities to develop and maintain knowledge of Reasonable Accommodation, FMLA/CFRA, disability management, and applicable Department policies and procedures.
5%	M	The DMC may assist with the development of training materials, program resources, job aids, and other informational materials and may assist with or participate in the delivery of presentations and training activities as assigned.

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

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KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The DMC develops and applies knowledge of laws, rules, policies, and practices related to personnel operations in State government, including but not limited to the Americans with Disabilities Act (ADA), Family and Medical Leave Act (FMLA), California Family Rights Act (CFRA), Reasonable Accommodation, Fair Employment and Housing Act (FEHA), and Equal Employment Opportunity Commission (EEOC) requirements.

The DMC must be familiar with Caltrans' mission and goals, policies, and procedures and be able to apply established personnel management program requirements in performing assigned duties. The DMC must be able to reason logically, use analytical and research techniques to evaluate personnel matters, exercise good judgment, organize and prioritize work, identify relevant information, develop solutions and recommendations, and determine when matters require additional review or escalation.

The DMC exercises independent judgment and discretion in researching, interpreting, and applying applicable statutes, regulations, policies, and procedures to assigned matters. Particularly complex, controversial, sensitive, or precedent-setting matters are elevated to an Analyst II or supervisor as appropriate.

The DMC must be able to express ideas and present information clearly and logically, both orally and in writing, to managers, supervisors, employees, and other stakeholders.

The DMC must have knowledge of various computer applications such as Word, Excel, PowerPoint, email (Outlook), claims management systems, and other Department applications used in performing assigned duties.

The DMC is expected to provide thorough and completed staff work on assigned personnel-related matters and seek guidance from an Analyst II or supervisor when additional consultation or higher-level review is appropriate.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The DMC exercises independent judgment and discretion within the scope of assigned responsibilities and is responsible for researching, interpreting, and applying established policies, procedures, laws, rules, regulations, and program guidance prior to providing information, developing recommendations, or taking appropriate action. Escalated matters are elevated to an Analyst II or supervisor as appropriate.

Poor judgment or errors could result in delays in resolving employee matters, inconsistent application of Department procedures, inappropriate actions, employee complaints, or potential financial liability or discredit to Caltrans.

The incumbent must comply 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 Caltrans employees' confidential information may damage the Office of WC, RTW, and RA/FMLA 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 DMC confers with managers, supervisors, employees, District Human Resource Liaisons, Human Resources programs, and other Department stakeholders in the performance of assigned duties. The DMC may also communicate with employee representatives, health care providers, and other external parties as appropriate to assigned RA/FMLA responsibilities.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

May be required to sit for prolonged periods of time, use a computer keyboard and monitor, and develop cooperative working relationships with all customers. The incumbent may be required to move training materials, manuals, or equipment and may be required to attend off-site meetings and travel throughout the state as needed.

Sustained mental activity will be required for problem solving, analysis, and reasoning. The incumbent must be able to recognize emotionally charged issues or problems and respond appropriately to difficult situations. The incumbent must have the ability to manage multiple ongoing cases at various stages in the RA/FMLA processes, adapt to changes in priorities, and complete tasks or projects on short notice.

The incumbent interacts with employees at all levels within the Department and other agencies. This interaction requires the ability to develop and maintain cooperative working relationships with individuals of diverse backgrounds.

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WORK ENVIRONMENT

The incumbent may telework regularly. When in the office, the incumbent will work in a climate-controlled environment under artificial light. There will be occasional fluctuations in building temperature. The incumbent will work in a cubicle and will periodically attend meetings and/or trainings. Some travel may be required.

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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