

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits & Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 435 - 5393 - 022	
DIVISION/UNIT Disability & Survivor Benefits/Disability Services	CLASS TITLE Analyst II	
INCUMBENT NAME Vacant	WORKING TITLE Disability Services Senior Analyst	
CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.		
Under direction of the Supervisor I, the Analyst II operating as the Disability Services Senior Analyst independently performs time-sensitive case management for an assigned caseload. As a member of the Disability Services team, the Analyst II engages in the determination of statutory and medical eligibility, payments, and various components of continuing qualifications for disability benefits. The incumbent is responsible for consistently providing a high-level of on-going communication with disability members both verbally and in writing. The Analyst II is responsible for complete analysis of the disability application resulting in a thorough and accurate final written summary recommendation to management.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.	
35%	ESSENTIAL FUNCTIONS Independently manage a time-sensitive caseload for members who apply for and/or receive disability benefits. Determine the appropriate analytical steps to take in each case. Determine critical and supporting information needed from the members, member physicians, workers' compensation carriers, attorneys, and school districts. Initiate and provide on-going verbal and written communication with the members, members' physicians, workers' compensation carriers, attorneys, school districts and/or CalSTRS Legal staff. Access member information using CalSTRS' databases to answer questions regarding the various benefits and options available to members including, but not limited to disability, service retirement, refunds, etc. Apply subject matter expertise in disability benefit qualification requirements to generate member specific communication and or conduct phone calls. Gather necessary documents to process, accurately calculate, and pay Service Retirement During Evaluation of a Disability Application (SRDEDA) and disability benefits. Research and analyze complex data and member cases to accurately process internal and external inquiries. Research, analyze and interpret Teachers' Retirement Law, CalSTRS rules, policies and directives to take corrective action in resolving inquiries. Research membership accounts and generate estimates upon request for all members pre and post disability retirement. Analyze all necessary medical, school, and financial documentation to determine if continuing qualifications are met. Determine, calculate, and apply offsets by analyzing legal documents, Workers' Compensation, tax and other benefits documentation. Independently write thorough and accurate case summaries and recommendations for approval or rejection for management approval and signature. Serve as the primary resource to members during the disability benefit process. Respond to members clearly and concisely to explain the complexities of the disability benefit program, including the impacts and consequences of their decisions through verbal and written communication. Responsible for managing caseload within strict processing timeframes to ensure the Teachers' Retirement Board Disability Services Service Level Objectives are met. Provide management with on-going caseload status.	
30%	Participate as a Disability Services team member and assist in the development of long-range plans and goals for the team in alignment with branch and division balanced score cards. Responsible for training newer staff members in various policies, procedures, and processes. Identify process changes and develop job aids to reflect those changes. Interpret CalSTRS statutes and laws pertaining to the disability program, as well as maintaining up to date knowledge on legislative changes and impacts of this legislation on the program.	
20%	Act as liaison to other divisions within CalSTRS to assure payment of benefits continues when significant events occur to the member's account, i.e., conversion to service retirement, return to work, or the death of a disabled member. Review and confirm accuracy of benefit calculations.	

10%	Prepare complex case chronologies and synopses for legal challenges and testify at administrative hearings and before the Teacher's Retirement Board. Required to testify at administrative hearings on processed executive reviews.
5%	MARGINAL FUNCTIONS Work closely with the Legal Office when an application for benefits includes a Power of Attorney and/or Court Order Deductions to verify legal compliance. Lead or participate in cross-functional projects/teams. Complete special projects that have substantial program or departmental impact.

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies located in the [Competency Guide](#) on Central.

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Support and model CalSTRS Core Values

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Occasional overnight in state/out of state travel
- Occasional travel to various locations for training and/or meetings
- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer several hours a day.
- Ability to move up to 15 pounds

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED

DUTY STATEMENT

EFFECTIVE DATE

BRANCH

Benefits & Services

POSITION NUMBER (Agency – Unit – Class – Serial)

815 - 435 - 5157 - XXX

DIVISION/UNIT

Disability & Survivor Benefits/Disability Services

CLASS TITLE

Analyst I

INCUMBENT NAME

Vacant

WORKING TITLE

Disability Case Management Analyst

CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.

Under supervision of the Pension Program Manager I, the Analyst I performs time sensitive case management for an assigned caseload. As a member of the Disability Services team, the Analyst I engages in the determination of statutory and medical eligibility, payments, and various components of continuing qualifications for disability benefits. The Analyst I is responsible for complete analysis of the disability application resulting in a thorough and accurate final written summary recommendation.

% of time performing duties

Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.

30%

ESSENTIAL FUNCTIONS

Responsible for management of a time-sensitive caseload for members who apply for and/or receive disability benefits. Determine the appropriate analytical steps to take in each case. Determine critical and supporting information needed from the members, member physicians, workers' compensation carriers, attorneys, and school districts. Initiate and provide on-going verbal and written communication with the members, member physicians, workers' compensation carriers, attorneys, school districts and/or CalSTRS legal staff. Access member information using CalSTRS' databases to answer questions regarding the various benefits and options available to members including but not limited to disability, service retirement, refunds, etc. Apply subject matter expertise in disability benefit qualification requirements to generate member specific communication and/or conduct phone calls. Gather necessary documents to process, accurately calculate, and pay Service Retirement During Evaluation of a Disability Application (SRDEDA) and disability benefits. Research and analyze complex data and member cases to accurately process internal and external inquiries. Research, analyze and interpret Teachers' Retirement Law, CalSTRS rules, policies and directives to take corrective action in resolving inquiries. Research membership accounts and generate estimates upon request for all members pre and post disability retirement. Analyze all necessary medical, school, and financial documentation to determine if continuing qualifications are met. Determine, calculate, and apply offsets by analyzing legal documents, Workers' Compensation, tax and other benefits documentation. Write thorough and accurate case summaries and recommendations for management approval or rejection.

30%

Serve as the primary resource to members during the disability benefit process. Respond to members clearly and concisely to explain the complexities of the disability benefit program, including the impacts and consequences of their decisions through verbal and written communication. Responsible for managing caseload within strict processing timeframes to ensure the Teacher's Retirement Board production goals and service level agreements are met. Provide management with on-going caseload status.

15%

Participate as a Disability Services team member and assist in the development of long-range plans and goals for the team in alignment with branch and division balanced score cards. Train new staff members on various policies, procedures and processes. Identify process changes and develop job aids to reflect those changes.

10%

Act as a liaison with other divisions at CalSTRS to assure benefit payments continue when significant events occur to the member's account, i.e. conversion to service retirement, return to work, or the death of disabled member. Review and confirm accuracy of benefit calculations.

10%	Prepare case chronologies and synopses for legal challenges. Testify at administrative hearings and/or before the Teachers' Retirement Board regarding disability benefits issues.
5%	MARGINAL FUNCTIONS Work closely with the Legal Office when an application for benefits includes a Power of Attorney and/or Court Order Deductions to verify legal compliance. Participate in DaSB special projects and/or cross-functional teams.

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

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WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer keyboard several hours a day
- Read from computer screens several hours a day
- Ability to move up to 10 pounds

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

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SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE SIGNED
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- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE SIGNED
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