Employment Development Department
State of California

☐ Current
☒ Proposed

POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Analyst I	**Field Office Trainer**
NAME OF INCUMBENT:	POSITION NUMBER:
	280-227-5157-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
ARU 227 – Field Office Training Support Unit I, II, III, or IV	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Command Center Division	Supervisor I
BRANCH:	REVISION DATE:
Disability Insurance Branch	7/14/2026

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 *(specify below in Description)*
☐ Other *(specify below in Description)*

Description of Position Requirements:
(e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.)

On rare occasions, local travel required for training opportunities.

3. DUTIES AND RESPONSIBILITIES OF POSITION

Summary Statement:
(Briefly describe the position's organizational setting and major functions)

Under the supervision of a Supervisor I, the incumbent performs less complex assignments under the guidance of a lead analyst in delivering less technical, program-related training for staff across the Field Offices. With assistance from the manager or lead analyst, the incumbent coordinates with the Training and Program Development Units (TPDU) to identify training needs, assess issues, and assist in developing solutions to support training objectives.

The incumbent monitors trainee progress throughout the New Hire Training (NHT) period to ensure trainees are advancing through required training milestones and developing proficiency in current policies, procedures, and operational practices. The incumbent provides ongoing coaching, guidance, and support to facilitate successful completion of the training program and communicates trainee progress or identified training needs to management, as appropriate.

Where appropriate, the incumbent assists in developing analytical reports and preparing justifications for recommended updates to training content, delivery methods, and instructional materials. In addition to delivering and tracking core training activities, the incumbent supports special projects as assigned and contributes to the development, implementation, and evaluation of training-related initiatives.

Civil Service Classification	Position Number
Analyst I	280-227-5157-xxx

The incumbent is required to maintain knowledge of Disability Insurance (DI) Branch program principles and protect program integrity by identifying and reporting suspected fraudulent claims and/or activities

Percentage of Duties	Essential Functions
40%	Works with a lead analyst or Supervisor I to deliver training to newly appointed Disability Insurance Program Representatives (DIPRs) and Support Staff during the New Hire Training (NHT) Program and provides refresher training, as needed, to support ongoing skill development and performance improvement. This training reinforces classroom instruction and supports the development of journey level competencies. The incumbent observes trainee performance throughout the training process and answers questions, reinforces training concepts, and monitors trainee progress to support successful completion of training and consistent application of laws, regulations, policies, procedures, and reference materials. The incumbent trains staff on duration control, providing quality customer service during all customer interactions, program integrity, claim processing, and system navigation throughout all phases of the claims lifecycle. Training emphasizes accurate claim processing, effective use of the Knowledge Management System (KMS), clear and concise case documentation, and appropriate use of approved macros and data tools to improve accuracy, consistency, and efficiency. Additionally, the incumbent assists with planning, developing, tracking, and reporting on training activities to support program goals and objectives. The incumbent provides updates to field and central office leadership regarding training progress, identifies and escalates issues requiring management attention, and analyzes less complex training-related issues to develop and recommend appropriate solutions.
30%	Works with a lead analyst or Supervisor I to Utilize the Field Office Basic Evaluation System (FOBES) to conduct structured evaluations of journey-level Disability Insurance Program Representatives (DIPRs) to ensure the consistent application of laws, regulations, policies, procedures, and operational practices. Documents evaluation results and identifies trends or recurring issues that indicate opportunities for refresher training and improvements to operational consistency and effectiveness. Coordinates quarterly FOBE activities with management, as appropriate. Supports program integrity by identifying and promptly reporting suspected fraud or abuse in accordance with departmental policies and procedures.
15%	Acts as an entry-level subject matter expert (SME) by supporting enterprise-level training initiatives and continuous improvement efforts. Collaborates with the Training and Program Development Unit (TPDU), Knowledge Management System Unit (KMSU), management, and lead analysts to identify, develop, update, and maintain training and reference materials, including training modules, procedures, job aids, system guidance, and other reference documents, to ensure consistency, accuracy, and completeness. When discrepancies in laws, regulations, policies, procedures, systems, or critical training content are identified, the incumbent works collaboratively with a lead analyst and appropriate stakeholders to research, resolve, and implement necessary updates. The incumbent

	communicates approved changes to trainees and journey-level Disability Insurance Program Representatives (DIPRs), as appropriate, to promote awareness and the accurate application of revised policies, procedures, and reference materials.
10%	The incumbent participates with a lead analyst in special study workgroups and projects focused on training initiatives. As an entry-level subject matter expert (SME), the incumbent provides feedback and recommendations to support process improvements, enhance training effectiveness, and improve operational efficiency. The incumbent participates in meetings related to training initiatives with management and other stakeholders, as needed.
Percentage of Duties	**Marginal Functions**
5%	Performs other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply)*

Standing: Occasionally - activity occurs < 33%	Sitting: Continuously - activity occurs > 66%
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: *Click here to enter text.*

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 have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Position Statement.

Employee's Name:

Employee's Signature: Date:

Supervisor's Statement:
I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.

Supervisor's Name:

Civil Service Classification	Position Number
Analyst I	280-227-5157-xxx

Supervisor's Signature:	Date:

7. HRSD USE ONLY

Classification and Pay Group (CPG) Approval

	CPG Analyst Initials	Date Approved
☒ Duties meet class specification and allocation guidelines. ☐ Exceptional allocation, STD-625 on file.	AF	10/5/2026

Reasonable Accommodation Unit use ONLY *(completed after appointment, if needed)*

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.

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

Civil Service Classification
Analyst I

Position Number
280-227-5157-xxx

Employment Development Department
State of California

☐ Current
☒ Proposed

POSITION STATEMENT

1. POSITION INFORMATION

CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Analyst II	**Field Office Trainer**
NAME OF INCUMBENT:	POSITION NUMBER:
	280-227-5393-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
ARU 227 – Field Office Training Support Unit I, II, III, or IV	
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Command Center Division	Supervisor I
BRANCH:	REVISION DATE:
Disability Insurance Branch	7/14/2026

Duties Based on: ☒ FT ☐ PT– Fraction _____ ☐ INT ☐ Temporary – _____ hours

2. REQUIREMENTS OF POSITION

Check all that apply:

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☒ 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 *(specify below in Description)*
☐ Other *(specify below in Description)*

Description of Position Requirements:
(e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.)

On rare occasions, local travel required for training opportunities.

3. DUTIES AND RESPONSIBILITIES OF POSITION

Summary Statement:
(Briefly describe the position's organizational setting and major functions)

Under the direction of a Supervisor I, the incumbent serves in a lead capacity in delivering complex technical and program-related training for staff across Field Offices. The incumbent coordinates with the Training and Program Development Units (TPDU) and other stakeholders to assess training needs, analyze issues, and develop solutions to support program objectives.

The incumbent independently monitors and assesses trainee progress throughout the New Hire Training (NHT) period to ensure trainees are developing proficiency in current policies, procedures, and operational practices. This includes tracking completion of training milestones, identifying areas requiring additional instruction, and providing coaching, guidance, and recommendations to support successful transition to journey-level performance.

Where appropriate, the incumbent develops analytical reports and provides data-driven recommendations to support updates to training content, delivery methods, instructional strategies, and reference materials. In addition to delivering and tracking core training activities, the incumbent leads or supports special projects as assigned, contributing to the development, implementation, and evaluation of enterprise training initiatives.

Civil Service Classification	Position Number
Analyst II	280-227-5393-xxx

The incumbent is required to maintain knowledge of the principles of the Disability Insurance (DI) Branch program and protect program integrity by identifying and reporting suspected fraudulent claims and/or activities in accordance with departmental policies and procedures.

Percentage of Duties	Essential Functions
40%	In a lead capacity, the incumbent serves as a subject matter expert (SME) responsible for planning, coordinating, and delivering New Hire Training (NHT) to newly appointed Disability Insurance Program Representatives (DIPRs) and Support Staff. The incumbent also provides refresher training, as needed, to support continued skill development and performance improvement. This training reinforces classroom instruction and supports the development of journey-level competencies. The incumbent monitors trainee progress, and reinforces the appropriate application of laws, regulations, policies, procedures, and reference materials. The incumbent independently trains staff on duration control, providing quality customer service during all customer interactions, program integrity, claim processing, and system navigation throughout all phases of the claim lifecycle. Training emphasizes accurate claim processing, effective use of the Knowledge Management System (KMS), clear and concise case documentation, and appropriate use of approved macros and data tools to improve accuracy, consistency, and efficiency. Additionally, the incumbent develops, tracks, and reports on training activities to ensure alignment with program goals and objectives. The incumbent provides updates to field and central office leadership, escalates training-related issues as appropriate, analyzes complex training and operational challenges, and develops recommendations to support continuous improvement of training delivery, processes, and materials.
30%	Utilizes the Field Office Basic Evaluation System (FOBES) to conduct structured evaluations of journey-level Disability Insurance Program Representatives (DIPRs) to assess the consistent application of laws, regulations, policies, procedures, and operational practices. Documents evaluation results and analyzes trends or recurring issues to identify opportunities for refresher training, process improvements, and enhancements to operational consistency and effectiveness. Compiles and analyzes FOBES data from across the DI Branch to identify trends, training gaps, and opportunities for targeted or refresher training. Evaluates training effectiveness and utilizes data findings to inform training needs, support continuous improvement efforts, and develop recommendations to enhance training initiatives and operational consistency. Communicates findings and recommendations to management, as appropriate. Supports program integrity by identifying and promptly reporting potential fraud or abuse to management in accordance with departmental policies and procedures.

15%	Acts as a subject matter expert (SME) by supporting enterprise-level training initiatives and continuous improvement efforts. Collaborates with the Training and Program Development Unit (TPDU), Knowledge Management System Unit (KMSU), management, and other stakeholders to identify training needs and develop, update, and maintain training and reference materials, including training modules, procedures, job aids, system guidance, and other reference documents, to ensure consistency, accuracy, and completeness. When discrepancies in laws, regulations, policies, procedures, systems, or critical training content are identified, the incumbent analyzes issues, collaborates with appropriate stakeholders to research solutions, and supports the implementation of necessary updates. The incumbent communicates approved changes to trainees and journey-level Disability Insurance Program Representatives (DIPRs), as appropriate, to promote awareness and accurate application of revised policies, procedures, and reference materials.
10%	The incumbent leads and participates in special study workgroups and projects focused on training initiatives, process improvements, and program enhancements. As a subject matter expert (SME), the incumbent provides analysis, expertise, feedback, and recommendations to improve training effectiveness, operational consistency, and efficiency. The incumbent facilitates meetings related to training initiatives with management and other stakeholders, as needed, and promotes collaboration to achieve program objectives.
Percentage of Duties	**Marginal Functions**
5%	Performs other duties as assigned.

4. WORK ENVIRONMENT *(Choose all that apply)*

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5. SUPERVISION EXERCISED:
(List total per each classification of staff)

N/A

6. SIGNATURES

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Employee's Name:

Employee's Signature: Date:

Civil Service Classification	Position Number
Analyst II	280-227-5393-xxx

Supervisor's Statement: *I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.*	
Supervisor's Name:	
Supervisor's Signature:	Date:

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Classification and Pay Group (CPG) Approval

☒ Duties meet class specification and allocation guidelines. ☐ Exceptional allocation, STD-625 on file.	CPG Analyst Initials	Date Approved
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- File original in the supervisor's drop file

Civil Service Classification
Analyst II

Position Number
280-227-5393-xxx