State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Senior Loss Prevention Consultant

Program:
Safety & Health Services

Work Unit:
Loss Prevention

Classification:
Senior Workers' Compensation Insurance Representative (Sr. WCIR)

Report To:
Area Manager, CalOSHA Consultation Service

Collective Bargaining Identifier (CBID):
R01

Fair Labor Standards Act (FLSA) Status:
Covered, Work Week Group 2

Special Requirements

Conflict of Interest Designation: Not applicable.

Program Information:

Safety and Health Services provides comprehensive services to our policyholders in alignment with the State Fund mission to lead the Workers' Compensation industry. We proactively engage with policyholders to help them create safer workplaces for all their employees and supply resources necessary to achieve and maintain effective safety practices.

Purpose/Scope:

Under the general direction of the Area Manager, CalOSHA Consultation Service (Loss Prevention Manager), the Senior Workers' Compensation Insurance Representative (Senior Loss Prevention Consultant) is responsible for providing safety and health services to policyholders/accounts with operations that present risk conditions of mid-level complexity and difficulty** to reduce employee injury/illness potential and workers' compensation costs.

** Risks of mid-level complexity and difficulty include:
• Smaller accounts using common technology and/or engineering controls (e.g., forklift operations, farm equipment, energy control measures, compared with more sophisticated and difficult-to-evaluate technologies);
• May have multiple locations;
• May have significant losses related to easily identifiable hazards and industrial operations of mid-range sophistication;
• Specialized services of lesser complexity such as industrial hygiene and ergonomics services (i.e., noise dosimetry and industrial ergonomic evaluations).

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Follow State Fund's Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

45% Essential

1. **Provide proficient knowledge and practice of Safety and Health Services to policyholders/accounts with operations that present risk conditions of mid-level complexity and difficulty**.**
    a. Contact assigned accounts and complete on-site visits per Safety and Health Services' policy and procedure to evaluate the safety needs of mid-level risks. If an on-site visit is not appropriate, document reason(s) via LPRO and/or other appropriate information management system
    b. Conduct on-site visits on assigned accounts to evaluate workplace hazards and the safety and health competence of the policyholder using Safety and Health Services' safety scoring methodology. Evaluations will include:
        i. Analysis of the risk presented;
        ii. Analysis of injury trends;
        iii. Develop recommendations with specific actions policyholders are to take to mitigate identified risks and injury trends per Authorized Loss Prevention policy and procedure.
        iv. Articulate the analysis and recommendations in writing to the policyholder/broker and within Loss Prevention's information management system.
    c. Manage policyholder compliance with recommendations. Provide subsequent/follow-up servicing and/or consultation to ensure that recommendations are implemented.
        i. Maintain communication to influence/encourage the policyholder to implement recommendations, based on the methodology established by Safety and Health Services.
        ii. Provide written and verbal instructions and advice to policyholder and/or policyholder employees on difficult and complex injury and illness prevention issues and identification and correction of safety and health hazards.
        iii. Report difficulties in resolving technical issues or managing policyholder compliance with recommendations to and obtain assistance as needed from Loss Prevention Engineer, Senior Loss Prevention Engineer or Loss Prevention Manager.
        iv. Ensure that imminent and serious hazards are corrected with appropriate urgency.
    d. Request specialized services necessary to address risks beyond expertise-level which may include the Loss Prevention Engineer, Senior Loss Prevention Engineer, Industrial Hygiene and/or Ergonomic services.
    e. Conduct accident investigations for significant claim events, as assigned.

20% Essential

2. **Document safety services internally and externally.**

a. Document all loss prevention services provided in the appropriate information management systems with factual and objective information in a timely manner, according to Safety and Health Services' policy and procedure.
b. Send the policyholder and broker (if broker account) written correspondence identifying the hazards, services provided, and provide concise recommendations made at the time of service per Safety and Health Services' policy and procedure.
c. Ensure all assigned accounts have a current Risk Assessment and correspondence as appropriate, according to the Safety and Health Services' policy and procedure.
d. Routinely review assigned accounts for changes in status, rise in loss trends, and increase in loss frequency.
e. Submit any Loss Prevention unit documentation or reports requested by management within agreed upon timelines.

15% Essential

3. Develop and maintain effective working relationships with broker business partners.

a. Maintain contact with brokers on Loss Prevention activities on their accounts as appropriate.
b. Develop and collaborate with the Loss Prevention Engineer as needed to plan, develop, present and participate in safety seminars for key stakeholders (i.e., policyholders, brokers, and external organizations).

15% Essential

4. Serve as a technical resource. Develop and maintain professional competencies.

a. Serve as a technical resource to other peers in the Loss Prevention function, Loss Prevention Manager, Underwriting, Marketing, and related as requested.
b. Assist in the coordination of out-of-region services to ensure that safety services are provided in a timely manner as assigned by the Loss Prevention Manager.
c. Request the assistance of higher levels of expertise from Loss Prevention Engineers as appropriate.
d. Maintain professional competencies by adhering to corporate and Safety and Health training policy and procedure and remaining up-to-date on current occupational safety and health information.

5% Marginal

5. Participate in special projects and committees.

a. Participate in special projects and committees as assigned by the Loss Prevention Manager.
b. Assist in writing and reviewing safety articles and publications as assigned by the Loss Prevention Manager.

100%

Required Knowledge Areas:

- Proficient knowledge of State Fund's Loss Prevention policies and procedures.
- Proficient understanding of various State Fund functions as they impact Loss Prevention.
- Working knowledge of State Fund standard software applications.
- Proficient knowledge of California's workers' compensation and occupational safety and health laws, rules and regulations.
- Proficient knowledge and practice of Safety and Health Services and industry best practices.

Required Skills and Abilities:

- Skill to assess workplace injury/illness risks based on understanding of business operations to improve safety.
- Skill to interpret California laws and regulations relating to workers' compensation and occupational safety and health issues.
- Skill to interpret and apply State Fund operating policies and procedures and take proper action.
- Skill to research, analyze, and evaluate information to make and support decisions.
- Skill to effectively work with and relate with other people.
- Skill to analyze issues, interpret and apply laws/regulations and policies and procedures to proactively make and support decisions.
- Skill to coordinate, facilitate, and make presentations.
- Skill to write professional and accurate reports and other communications suitable for distribution to internal and external customers.
- Skill to manage multiple projects and tasks.
- Skill to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders".
- Skill to interpret charts and graphs and mechanical relationships.

Work Environment:

Physical Requirements:

- Incumbent works in the usual office environment.
- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- May be expected to wear Personal Protective Equipment (PPE) such as safety goggles, hard hat, and steel-toes shoes.
- Occasional movement of items, positioning self at various heights, ascending, and transporting equipment
- Move/remain in a stationary position for up to 2 hours at a time.

Travel:

- Travel to and access insureds' job sites.
- Travel to various work sites and locations for training and/or meetings.
- Travel conditions may include urban and/or rural areas and could involve traversing uneven surfaces or ascending stairs.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.
- Travel may occasionally be from overnight to five days in duration.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.
- Will occasionally involve work in the evenings.

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Position Information

Employee Name:

Position Title:
Loss Prevention Consultant

Program:
Safety & Health Services

Work Unit:
Loss Prevention

Classification:
Workers' Compensation Insurance Representative (WCIR)

Report To:
Area Manager, CalOSHA Consultation Service

Collective Bargaining Identifier (CBID):
R01

Fair Labor Standards Act (FLSA) Status:
Covered, Work Week Group 2

Special Requirements

Conflict of Interest Designation: Not applicable.

Bilingual Position: Not applicable.

Rotational Assignment: Not applicable.

Program Information:

Safety and Health Services provides comprehensive services to our policyholders in alignment with the State Fund mission to lead the Workers' Compensation industry. We proactively engage with policyholders to help them create safer workplaces for all their employees and supply resources necessary to achieve and maintain effective safety practices.

Purpose/Scope:

Under the direction of the Area Manager, CalOSHA Consultation Service (Loss Prevention Manager), the Workers' Compensation Insurance Representative (Loss Prevention Consultant) is responsible for providing safety and health services to policyholders with operations that present risk conditions of lower-level complexity and difficulty to reduce employee injury and illness potential and workers compensation costs.

The incumbent will be expected to:

- Plan, evaluate, and provide quality safety services to assigned accounts.
- Document safety services internally in appropriate information management system and externally via correspondence to policyholders and their brokers, if applicable.
- Manage servicing of policyholders by utilizing appropriate information management system Book of Business.
- Participate in external outreach activities

• Participate in the State Fund Loss Prevention training program and complete all courses satisfactorily.
• Maintain professional skill development through on-going education which is completed in a satisfactory manner.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Follow State Fund's Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

45% Essential

1. **Provide safety and health services to policyholders/accounts with operations that present risk conditions of low-level complexity and difficulty. With oversight from the Loss Prevention Manager (training, direction, and feedback), develop competencies needed to plan, evaluate, and provide safety services for policyholders/accounts with operations that present risk conditions with increased complexity and difficulty.**
    a. Contact assigned accounts and complete on-site visits per Safety and Health Services' policy and procedure to evaluate the safety needs of lower-level risks. If an on-site visit is not appropriate, document reason(s) via the appropriate information management system.
    b. Conduct on-site visits on newly assigned accounts to evaluate workplace hazards and the safety and health competence of the policyholder using Safety and Health Services' safety scoring methodology. Evaluations will include:
        i. Analysis of the risk presented and review with Loss Prevention Manager.
        ii. Analysis of injury trends and review with Loss Prevention Manager.
        iii. Develop recommendations with specific actions policyholder is to take to mitigate identified risks and injury trends per Authorized Loss Prevention policy and procedure. Present recommendations to the Loss Prevention Manager to ensure thoroughness and accuracy of action plans, then present to policyholders.
    c. Manage policyholder compliance with recommendations. Provide subsequent/follow-up servicing and/or consultation to ensure that recommendations are implemented.
        i. Maintain communication to influence/encourage the policyholder to implement recommendations, based on the methodology established by Safety and Health Services.
        ii. Provide instruction and advice to policyholder and/or policyholder employees on injury and illness prevention issues and identification and correction of safety and health hazards.
        iii. Report difficulties and obtain assistance as needed from Senior Loss Prevention Consultant, Loss Prevention Engineer, Senior Loss Prevention Engineer or Loss Prevention Manager
        -- to resolve technical issues or managing policyholder compliance with recommendations
        -- to ensure that imminent and serious hazards are corrected with appropriate urgency

d. Request specialized services necessary to address risks beyond expertise-level which may include the Senior Loss Prevention Consultant, Loss Prevention Engineer, Senior Loss Prevention Engineer, Industrial Hygiene and/or Ergonomic services.

35% Essential

2. Document safety services internally and externally.

a. Document all loss prevention services provided in the appropriate information management systems with factual and objective information in a timely manner, according to Safety and Health Services' policy and procedure.
b. Send the policyholder and broker (if broker account) correspondence identifying the hazards, services provided, and recommendations made at the time of service per Safety and Health Services' policy and procedure.
c. Ensure all assigned accounts have a current Risk Assessment and correspondence as appropriate, according to the Safety and Health Services' policy and procedure.
d. Routinely review assigned accounts for changes in status, rise in loss trends, and increase in loss frequency.
e. Submit any Loss Prevention documentation or reports requested by management within agreed upon timelines.

10% Essential

3. Manage servicing of policyholders by utilizing appropriate information management system book of business.

a. Routinely review and manage book of business to ensure Loss Prevention services are provided on a timely basis per Safety and Health Services' policy and procedure.
b. Complete a Pre-Site visit form for each newly assigned account.
c. Conduct on-site visit which includes completion of a Risk Assessment.
d. Document all loss prevention services provided in LPRO and other appropriate information management systems with factual and objective information in a timely manner, according to Loss Prevention policy and procedure.
e. Send the policyholder and broker (if broker account) correspondence identifying the hazards, services provided, and recommendations made at the time of service per Safety and Health Services' policy and procedure.
f. Routinely review assigned accounts for loss trends and loss frequency to identify service needs.
g. Provide safety services to those accounts identified by management for purposes of high-risk surveillance or retention.

5% Marginal

4. Participate in outreach activities.

a. Support Loss Prevention outreach activity (i.e., Employer Seminars, Loss Prevention Safety Campaigns).
b. Participate in special projects and committees as assigned by the Loss Prevention Manager.
c. Assist in writing and reviewing safety articles and publications as assigned by the Loss Prevention Manager.

5% Marginal

5. Maintain professional skill development through on-going education.

a. Complete all core training requirements satisfactorily within designated time frames.
b. Attend on-going training provided by Safety and Health Services or external entities to ensure maintenance of technical expertise in the occupational safety and health discipline.

100%

Required Knowledge Areas:

- Working knowledge of State Fund's Loss Prevention policies and procedures.
- General understanding of various State Fund functions as they impact Loss Prevention.
- Working knowledge of State Fund standard software applications.
- General knowledge of California's workers' compensation and occupational safety and health laws, rules and regulations.

Required Skills and Abilities:

- Ability to interpret charts and graphs, and mechanical relationships.
- Ability to interpret California laws and regulations relating to workers' compensation and occupational safety and health issues.
- Ability to interpret and apply State Fund operating policies and procedures and take proper action.
- Ability to research, analyze, and evaluate information to make and support decisions.
- Ability to effectively work with and relate with other people.
- Ability to work independently under the direction of the Loss Prevention Manager and as a team with co-workers to address and resolve issues.
- Ability to coordinate, facilitate, and make presentations.
- Ability to write professional and accurate reports and other communications suitable for distribution to internal and external customers.
- Ability to manage multiple projects and tasks.

Work Environment:

Physical Requirements:

- Incumbent works in the usual office environment.
- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- May be expected to wear Personal Protective Equipment (PPE) such as safety goggles, hard hat, and steel-toes shoes.

Travel:

- Travel to and access insureds' job sites.
- Travel to various work sites and locations for training and/or meetings.
- Travel conditions may include urban and/or rural areas and could involve traversing uneven surfaces or ascending stairs.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.
- Travel may occasionally be from overnight to five days in duration.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.
- Will occasionally involve work in the evenings.