State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Assistant Claims Manager (ACM)

Program:
Regional and State Contract Claims

Work Unit:
Claims

Classification:
Manager I, SCIF

Report To:
Claims Manager (Manager II, SCIF)

Collective Bargaining Identifier (CBID):
S01

Fair Labor Standards Act (FLSA) Status:
Not Covered, Exempt. Work Week Group E

Special Requirements

Conflict of Interest Designation: Yes
This position is designated under the State Fund Conflict of Interest Code. The position is responsible for making or participating in the making of governmental decisions that may have a material effect on personal financial interests. The selected candidate is required to complete the Statement of Economic Interest—Form 700 within 30 days of appointment and once per year thereafter.

Bilingual Position: Not applicable.

Rotational Assignment: Not applicable.

Program Information:

Review and administer workers' compensation claims ensuring injured workers receive appropriate benefits and medical treatment. Pay what we owe, defend what we don't, and do so with a great sense of urgency.

Purpose/Scope:

Under the general direction of the Manager II, SCIF, the Manager I, SCIF will:

- Manage (plan, organize, direct and control) a unit responsible for proactively adjusting, finalizing and controlling a case assignment and/or specialized assignment(s).
- Recruit, hire, train, develop, appraise and discipline staff.
- Ensure timely and accurate liability decisions and benefit provision.
- Ensure timely, current, accurate and adequate estimates and case documentation.
- Manage and coordinate special projects as assigned by Claims Management or Corporate management.
- Contribute to the Claims management team.

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

20% Essential

1. Manage (plan, organize, direct and control) a unit responsible for proactively adjusting, finalizing and controlling a case assignment and/or specialized assignment(s), according to Claims Management, Corporate policies and procedures and DWC laws and regulations.

a. Establish and administer unit procedures and workflow processes and balance the workload to achieve Key Result Areas and Claims Office objectives.
b. Promote proactive claims adjustment and teamwork to insure State Fund's fiscal integrity, maximize use of cost containment programs, and timely, cost-effective finalizations and inventory control.
    i. Ensure timely referrals and appropriate follow-up/coordination with Claims Specialist resources
c. Ensure tasks are completed in compliance with DWC laws/regulations, Claims Management and Corporate policies and procedures.
    i. Disseminate information to staff as needed.
    ii. Regularly review/monitor staff assignments and performance to identify and address performance issues and training needs.
d. Coach staff in developing effective (case) strategies to proactively resolve issues and control costs.
e. Coordinate with Claims Management to implement plans to achieve effective and efficient operational results.
f. Ensure appropriate referral of claims to State Fund Legal and Subrogation Department.
g. Ensure appropriate referral of fraud issues/red flags to Fraud Liaison.
    i. Defend State Fund against fraudulent activities.

20% Essential

2. Provide professional public relations/customer service.

a. Participate with Claims Liaisons and claims staff at meetings with policyholders, brokers or State Agencies as requested.
b. Communicate with and respond to inquires from policyholders, brokers, State Agencies and the workers' compensation community.
c. Respond to complaints, audits and inquires as needed.
d. Participate in WCAB hearings when necessary.
e. Establish and maintain effective working relationships and uphold principles of integrity in the workplace.
f. Provide quality customer service in a timely manner
    i. Take "ownership" of each customer contact to address needs and endeavor to meet
    ii. State Fund objectives.

iii. Help in the retention of all State Fund Customers.

15% Essential

3. Recruit, hire, train, develop, appraise and discipline staff, according to Claims Management, Corporate policies and procedures and civil service laws, regulations, policies and procedures.

a. Recruit and hire subordinate staff
   i. Begin the hiring process upon knowledge of a vacancy.
   ii. Recruit and interview in a fair and impartial manner, and in accordance with State civil service and State Fund policies and procedures for hiring.
   iii. Keep Claims Manager apprised of vacancies in the unit and efforts to fill.
   iv. Participate in job fairs, testing and interview panels.
b. Duty Statements
   i. Regularly review duty statements for staff and update as changes occur in workflow and responsibilities. Discuss revised duty statements with staff.
   ii. Discuss duty statements with new hires.
c. Training and development
   i. Develop, coordinate and participate in entry-level training for newly-hired staff.
   ii. Review and monitor training to ensure staff receives instruction and coaching to proficiently perform assigned responsibilities in compliance with legislated adjuster certification and continuing education requirements.
   iii. Coordinate training and career development as part of the appraisal process and in consultation with the Claims Manager.
d. Coordinate, provide and participate in Claims Training program and act as a training resource.
   i. Coordinate with Claims Management, Corporate Claims and HR Learning and Development to develop, provide and/or assist with claims training as requested.
   ii. Identify training needs and recommend appropriate training for the claims team.
e. Appraise and discipline staff
   i. Provide timely probationary and annual performance appraisals.
   ii. Provide feedback, training and discipline as necessary and appropriate to improve performance or correct performance deficiencies.
   iii. Document and follow-up on all employee performance deficiencies or other personnel issues.
   iv. Keep Claims Manager apprised.
f. Respond to grievances and complaints as needed
g. Ensure personnel safety

15% Essential

4. Ensure timely and accurate liability decisions and benefit provision, according to Claim Management, Corporate policies and procedures and DWC laws/regulations.

a. Ensure liability decisions are made timely and justified by pertinent and accurate documentation.
b. Authorize investigations as needed.
c. Monitor delayed cases to ensure timely and appropriate follow-up.
d. Approve denials of liability as recommended by staff and based on pertinent and accurate documentation.
e. Ensure timely and accurate benefits are provided and mandatory Benefit notices are sent timely and accurately.
f. Review and authorize compensation and medical payments and awards above staff authority levels.

15% Essential

5. Ensure timely, current, accurate and adequate estimates and case documentation to protect the fiscal integrity of State Fund in accordance with Claim Management and Corporate Office policies and procedures.

a. Review and authorize estimates above adjuster authority levels.

b. Review and update adjuster's estimate authorization levels.
c. Ensure all estimates are timely, current, accurate and adequate and supported by file documentation.
d. d. Ensure Paid Exceeds estimate are corrected timely and accurately.
e. Monitor and ensure timely case balancing and reconciliation.
f. Ensure all activities are supported by adequate documentation.
g. Ensure all required regulatory reporting systems are updated and kept current.
h. Ensure State Fund data systems are updated and accurate as needed.

10% Essential

6. Manage and coordinate special projects as assigned by Claims and Corporate Management.

a. Manage, coordinate and complete special projects as requested.
b. Participate in Office and Corporate claims projects
c. Identity and recommend to management new procedures and workflows. Implement regulatory changes, new technologies, systems and programs as appropriate.
d. Assist in developing procedures and workflow processes to streamline operations.
e. Assist in training employees on new procedures, workflows, technologies, systems and programs.

5% Essential

7. Contribute to the Claims management team.

a. Attend and actively participate in all claims management team meetings
    i. Be proactive in identifying issues that arise and be prepared to offer solutions to improve procedures or resolve problems.
b. Fill in for absent Claims Manager and other ACMs as needed

100%

Required Knowledge Areas:

- Working Knowledge of workers' compensation laws, policies, procedures, and guidelines to effectively manage unit activities.
- Working Knowledge of State Fund's core values, mission, purpose and objectives to ensure program and associated projects are in compliance.
- Working Knowledge of basic computer programs (e.g., Word, Excel, PowerPoint, Outlook) to perform duties related to the job.
- Working Knowledge of basic arithmetic (i.e., addition, subtraction, multiplication, division) to analyze and interpret numerical data and perform computations.
- Working Knowledge of time management techniques to provide for efficient prioritization and completion of work assignments for self and staff.
- Working Knowledge of principles and process for providing customer service, including customer needs assessment, meeting quality standards for services, and evaluating customer satisfaction to ensure the unit provides quality customer service.
- Working Knowledge of when to refer issues to management to ensure management is apprised of critical escalated issues.
- Working Knowledge of the basic rules of grammar, punctuation and spelling in the English language to write reports, memorandums, letters, etc., that are easily understood and clear to the reader/audience.
- Working Knowledge of various State Fund functions as they impact claims.
- Working Knowledge of general management and personnel management principles and practices.

Required Skills and Abilities:

- Skill to adapt plans and schedules to meet changing priorities of work objectives, personnel, resources, and/or workload demands.
- Skill to apply workers' compensation laws, policies, procedures and guidelines to effectively manage department activities.
- Skill to assign and delegate work to subordinate employees to ensure the department operates effectively.
- Skill to perform basic arithmetic operations (addition, subtraction, multiplication and division) to review accuracy of financial and transaction information.
- Skill to communicate and listen effectively with a variety of individuals (e.g., coworkers, public, staff) to relay and receive information accurately as the situation demands.
- Skill to follow written and verbal directions related to work assignments/tasks needing to be completed to perform job related tasks.
- Skill to foster respect for cultural, race and gender diversity, as well as other individual differences among individual subordinate staff members.
- Skill to manage multiple projects and tasks.
- Skill to handle stressful situations while being firm but tactful.
- Skill to analyze data, information and situations to draw sound conclusions and adopt an effective course of action.
- Skill to utilize basic computer programs (i.e., Word, Excel, Outlook, PowerPoint, etc.) to conduct work-related projects, documentation, project management, etc.
- Skill to conduct meetings with staff to communicate information that is necessary for job performance.

Work Environment:

Physical Requirements:

- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- Incumbent works in the usual office environment.

Travel:

- Travel to various work sites and locations for training and/or meetings.
- Travel may occasionally be for extended periods.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.

Supervisor's Statement: **I have discussed the duties of the position with the employee**

Supervisor Name (Print):	Supervisor Signature:	Date:

Employee's Statement: **I have discussed with my supervisor the duties of the position and have received a copy**

Employee Name (Print):	Employee Signature:	Date:

State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Assistant Claims Manager (ACM)

Program:
Regional and State Contract Claims

Work Unit:
Claims

Classification:
Workers' Compensation Insurance Supervisor II

Report To:
Claims Manager (Manager II, SCIF)

Collective Bargaining Identifier (CBID):
S01

Fair Labor Standards Act (FLSA) Status:
Not Covered, Exempt. Work Week Group E

Special Requirements

Conflict of Interest Designation: Yes
This position is designated under the State Fund Conflict of Interest Code. The position is responsible for making or participating in the making of governmental decisions that may have a material effect on personal financial interests. The selected candidate is required to complete the Statement of Economic Interest—Form 700 within 30 days of appointment and once per year thereafter.

Program Information:

Review and administer workers' compensation claims ensuring injured workers receive appropriate benefits and medical treatment. Pay what we owe, defend what we don't, and do so with a great sense of urgency.

Purpose/Scope:

Under the direction of the Manager II, SCIF, the Workers' Compensation Insurance Supervisor II will:

• Manage (plan, organize, direct and control) a unit responsible for proactively adjusting, finalizing and controlling a case assignment and/or specialized assignment(s).

• Recruit, hire, train, develop, appraise and discipline staff.

• Ensure timely and accurate liability decisions and benefit provision.

• Ensure timely, current, accurate and adequate estimates and case documentation.

• Contribute to the Claims management team.

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

20% Essential

1. **Manage (plan, organize, direct and control) a unit responsible for proactively adjusting, finalizing and controlling a case assignment and/or specialized assignment(s), according to Claims Management, Corporate policies and procedures and DWC laws and regulations.**
    a. Establish and administer unit procedures and workflow processes and balance the workload to achieve Key Result Areas and Claims Office objectives.
    b. Promote proactive claims adjustment and teamwork to insure State Fund's fiscal integrity, maximize use of cost containment programs, and timely, cost-effective finalizations and inventory control.
        i. Ensure timely referrals and appropriate follow-up/coordination with Claims Specialist resources.
    c. Ensure tasks are completed in compliance with DWC laws/regulations, Claims Management and Corporate policies and procedures.
        i. Disseminate information to staff as needed.
        ii. Regularly review/monitor staff assignments and performance to identify and address performance issues and training needs.
    d. Coach staff in developing effective (case) strategies to proactively resolve issues and control costs.
    e. Coordinate with Claims Management to implement plans to achieve effective and efficient operational results.
    f. Ensure appropriate referral of claims to State Fund Legal and Subrogation Department.
    g. Ensure appropriate referral of fraud issues/red flags to Fraud Liaison.
        i. Defend State Fund against fraudulent activities.

20% Essential

2. **Provide professional public relations/customer service.**
    a. Participate with Claims Liaisons and claims staff at meetings with policyholders, brokers or State Agencies as requested.
    b. Communicate with and respond to inquires from policyholders, brokers, State Agencies and the workers' compensation community.
    c. Respond to complaints, audits and inquires as needed.
    d. Participate in WCAB hearings when necessary.
    e. Establish and maintain effective working relationships and uphold principles of integrity in the workplace.
    f. Provide quality customer service in a timely manner.
        i. Take "ownership" of each customer contact to address needs and endeavor to meet State Fund objectives.

ii. Help in the retention of all State Fund Customers.

25% Essential

3. Recruit, hire, train, develop, appraise and discipline staff, according to Claims Management, Corporate policies and procedures and civil service laws, regulations, policies and procedures.

a. Recruit and hire subordinate staff
   i. Begin the hiring process upon knowledge of a vacancy.
   ii. Recruit and interview in a fair and impartial manner, and in accordance with State civil service and State Fund policies and procedures for hiring.
   iii. Keep Claims Manager apprised of vacancies in the unit and efforts to fill.
   iv. Participate in job fairs, testing and interview panels.
b. Duty Statements
   i. Regularly review duty statements for staff and update as changes occur in workflow and responsibilities. Discuss revised duty statements with staff.
   ii. Discuss duty statements with new hires
c. Training and development
   i. Develop, coordinate and participate in entry-level training for newly-hired staff.
   ii. Review and monitor training to ensure staff receives instruction and coaching to proficiently perform assigned responsibilities in compliance with legislated adjuster certification and continuing education requirements.
   iii. Coordinate training and career development as part of the appraisal process and in consultation with the Claims Manager.
d. Coordinate, provide and participate in Claims Training program and act as a training resource.
   i. Coordinate with Claims Management, Corporate Claims and HR Learning and Development to develop, provide and/or assist with claims training as requested.
   ii. Identify training needs and recommend appropriate training for the claims team.
e. Appraise and discipline staff
   i. Provide timely probationary and annual performance appraisals.
   ii. Provide feedback, training and discipline as necessary and appropriate to improve performance or correct performance deficiencies.
   iii. Document and follow-up on all employee performance deficiencies or other personnel issues
   iv. Keep Claims Manager apprised.
f. Respond to grievances and complaints as needed
g. Ensure personnel safety

20% Essential

4. Ensure timely and accurate liability decisions and benefit provision, according to Claim Management, Corporate policies and procedures and DWC laws/regulations.

a. Ensure liability decisions are made timely and justified by pertinent and accurate documentation.
b. Authorize investigations as needed.
c. Monitor delayed cases to ensure timely and appropriate follow-up.
d. Approve denials of liability as recommended by staff and based on pertinent and accurate documentation.
e. Ensure timely and accurate benefits are provided and mandatory Benefit notices are sent timely and accurately.
f. Review and authorize compensation and medical payments and awards above staff authority levels.

10% Essential

5. Ensure timely, current, accurate and adequate estimates and case documentation to protect the fiscal integrity of State Fund in accordance with Claim Management and Corporate Office policies and procedures.

a. Review and authorize estimates above adjuster authority levels.
b. Review and update adjuster's estimate authorization levels.

c. Ensure all estimates are timely, current, accurate and adequate and supported by file documentation.
d. Ensure Paid Exceeds estimate are corrected timely and accurately.
e. Monitor and ensure timely case balancing and reconciliation.
f. Ensure all activities are supported by adequate documentation.
g. Ensure all required regulatory reporting systems are updated and kept current.
h. Ensure State Fund data systems are updated and accurate as needed.

5% Essential

6. Contribute to the Claims management team.

a. Attend and actively participate in all claims management team meetings
   i. Be proactive in identifying issues that arise and be prepared to offer solutions to improve procedures or resolve problems.
b. Fill in for absent Claims Manager and other ACMs as needed

100%

Required Knowledge Areas:

- Working knowledge of workers' compensation laws, policies, procedures, and guidelines to effectively manage unit activities.
- Working knowledge of State Fund's core values, mission, purpose and objectives to ensure program and associated projects are in compliance.
- Working knowledge of basic computer programs (e.g., Word, Excel, PowerPoint, Outlook) to perform duties related to the job.
- Working knowledge of basic arithmetic (i.e., addition, subtraction, multiplication, division) to analyze and interpret numerical data and perform computations.
- Working knowledge of time management techniques to provide for efficient prioritization and completion of work assignments for self and staff.
- Working knowledge of principles and process for providing customer service, including customer needs assessment, meeting quality standards for services, and evaluating customer satisfaction to ensure the unit provides quality customer service.
- Working knowledge of when to refer issues to management to ensure management is apprised of critical escalated issues.
- Working knowledge of the basic rules of grammar, punctuation and spelling in the English language to write reports, memorandums, letters, etc., that are easily understood and clear to the reader/audience.
- Working knowledge of various State Fund functions as they impact claims.
- Working knowledge of general management and personnel management principles and practices.

Required Skills and Abilities:

- Skill to adapt plans and schedules to meet changing priorities of work objectives, personnel, resources, and/or workload demands.
- Skill Skill to apply workers' compensation laws, policies, procedures and guidelines to effectively manage department activities.
- Skill to assign and delegate work to subordinate employees to ensure the department operates effectively.
- Skill to perform basic arithmetic operations (addition, subtraction, multiplication and division) to review accuracy of financial and transaction information.

- Skill to communicate and listen effectively with a variety of individuals (e.g., coworkers, public, staff) to relay and receive information accurately as the situation demands.
- Skill to follow written and verbal directions related to work assignments/tasks needing to be completed to perform job related tasks.
- Skill to foster respect for cultural, race and gender diversity, as well as other individual differences among individual subordinate staff members.
- Skill to manage multiple tasks.
- Skill to handle stressful situations while being firm but tactful.
- Skill to analyze data, information and situations to draw sound conclusions and adopt an effective course of action.
- Skill to utilize basic computer programs (i.e., Word, Excel, Outlook, PowerPoint, etc.) to complete documentation, etc.
- Skill to conduct meetings with staff to communicate information that is necessary for job performance.

Work Environment:

Physical Requirements:

- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- Incumbent works in the usual office environment.

Travel:

- Travel to various work sites and locations for training and/or meetings.
- Travel may occasionally be for extended periods.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.

Supervisor's Statement: I have discussed the duties of the position with the employee

Supervisor Name (Print):	Supervisor Signature:	Date:

Employee's Statement: I have discussed with my supervisor the duties of the position and have received a copy

Employee Name (Print):	Employee Signature:	Date: