State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Customer Care Advisor

Program:
PolicyService Center

Work Unit:
PolicyService Center

Classification:
Workers' Compensation Insurance Technician

Report To:
Manager I, SCIF

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:

To aim for self-service first that empowers our customers to drive their own service experience, and, to be trusted partner for State Fund Service. Our agents are service navigators, providing caring and complete service when our customers need us.

Purpose/Scope:

Under the supervision of the PolicyService Center Manager (Manager I, SCIF), PolicyService Center Workers' Compensation Insurance Technician is responsible for:

• Processing routine and semi-complex tasks for policies with a standard premium level up to $49,999, in compliance with corporate underwriting and marketing advisories, guidelines and procedures.
• Providing quality customer service to policy holders, claimants, brokers, medical providers, lien claimants, the general public and internal business partners.
• Processing work received through various channels (phone, fax, email, chat, regular mail, etc.) within established time frames as outlined in the PolicyService Center policies and procedures.
• Work on special projects as assigned.

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. **Coordinate, document accurate and timely responses, and provide quality customer service to policyholders and brokers, in compliance with corporate underwriting and marketing advisories.**
    a. Process semi-complex* tasks/servicing inquiries through various channels (phone, fax, email, regular mail, chat, etc.), in compliance with corporate underwriting and marketing advisories.
        a. Semi-complex tasks include, but are not limited to:
            - Employer Liability Limit Increases
            - Location Updates (No Additions)
            - Non-Causal Cancellation CE, CD, CB, CS, CT, CC and Notice of Cancellation Extensions over 30 Days Notice
            - Non-G-Class Codes Changes
            - Password Reset/Online Assistance
            - Payroll Exposure Changes & the processing of the payroll report submissions
            - BindNow Questions
            - Renewal Inquiries/Auto Renewal Assistance
            - Trade Name Change Corrections/Additions
            - Waivers of Subrogation
            - Entity Changes
            - Nominal Ownership Changes
            - WCIRB Queries
            - Payment Plans (terms up to 4 months)
            - Supercede and Replace (Causal - up to 30 days with appropriate documentation)
            - Cancellation withdrawal requests (CMNP only)
    b. Process routine tasks/servicing inquiries through various channels (phone, fax, email, regular mail, chat etc.), in compliance with corporate underwriting and marketing advisories. These tasks include, but are not limited to:
        a. These tasks include, but are not limited to:
            - Additional Insured
            - Blanket Waivers
            - Certificates
            - Contact Info Update
            - Document Copies
            - Legal Name Correction
            - License Update
            - Loss Runs Requests
            - Mailing Address Update
            - Dividend inquiries
            - Unclaimed property inquiries

- Processing Payments

c. Document servicing and maintenance activities in State Fund Online (SFO) and Policy Operations Portal (POP) Activity Log/Tab, in a timely manner.
d. Ensure appropriate referral of safety, fraud, premium/classification issues/red flags to Special Investigation Unit, Claims, Loss Prevention, Underwriter and/or Auditing.

35% Essential

2. Consult and/or work with WCIR on complex* servicing tasks/inquiries received through various channels (phone, fax, email, chat, regular mail, etc.), in compliance with corporate underwriting and marketing advisories.

a. *Complex tasks include, but are not limited to:
- WCIRB Inquiries (if escalated, Duplicate Coverage, Legal Format, Inspection)
- Ownership Updates and AB 2883 (if escalated)
- Entity/Legal Name Change - (if escalated)
- Pricing Questions (on bills)
- Causal Cancellations C5, C6, CQ
- Agreed Payroll
- Billing Queries
- Premium Transfer Requests
- Payment Plans (terms beyond 4 months)
- Supercede and Replace (Causal - beyond 30 days without appropriate documentation)
- Cancellation withdrawal requests (complex cancellations CQ/CZ/C9)

10% Essential

3. Maintain knowledge of corporate policies and procedures and effectively utilize State Fund Computer systems and programs.

a. Maintain knowledge of WISP, IRMA, SFO, QMS, POP, Outlook, Policy Imageline, GLIA (if applicable), WCIRB Connect, OCS, SNAP, OTL, Work Force Optimization, Date Aggregator, Microsoft Office computer programs, and any new programs as they become available.
b. Promptly report telephone, computer or systems malfunction to appropriate Manager, Work Force Management, and IT Help Desk.

5% Essential

4. Participate in brokerage and policyholder outreach.

a. Communicate any servicing issues from brokerages and policyholders.
b. Develop and maintain agency relationships.

5% Marginal

5. Special projects as assigned by Management, including side by side training and job shadowing.

a. All special assignments will be completed on time and in the manner specified by manager or supervisor.

100%

Required Knowledge Areas:

- Working knowledge of State Fund underwriting and marketing advisories, policies, and procedures.

- Working knowledge of workers' compensation insurance rules and regulations.
- Working knowledge of the State Fund organization, Regional Office and Corporate functions, and business policies and practices.
- Working knowledge of various State Fund functions as they affect underwriting, marketing, claims.

Required Skills and Abilities:

- Ability to interpret/apply policies and procedures to complete assignments.
- Ability to achieve results according to objectives.
- Ability to manage multiple projects and tasks.
- Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders".
- Ability to effectively work with and relate with other people.
- Ability to manage multiple projects and tasks.
- Ability to provide excellent customer service in a timely matter.
- Ability to manage time for the completion of tasks and projects in a timely matter.
- Ability to demonstrate and maintain a positive attitude in a challenging environment.
- Ability to adapt to change in the workplace.

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

Emergency call backs:

- Not applicable.

Work Hours:

- PolicyService Center hours of operations.
- Hours may vary do to shift realignment.
- Will occasionally involve work in the evenings.

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: