

JOB DESCRIPTION
San Diego County Office of Education

Claims Specialist

Purpose Statement

The Claims Specialist is responsible for investigating, evaluating, processing, and managing liability, property, auto, general liability, and employment claims; providing testimony in benefit disputes of member districts and charter schools of the Risk Management Joint Powers Authority (JPA); and assisting JPA defense panel attorneys with litigation in defense of member school districts, charter schools and their employees. This position serves as a hybrid position consisting of primarily claims investigation work with the ability to handle highly complex property loss claims and/or alleviating with workload of other senior claims adjusters.

Diversity Statement:

Because each person is born with inherent worth and dignity, and because equitable access and opportunity are essential to a just, educated society, SDCOE employee commitments include being respectful of differences and diverse perspectives, and being accountable for one's actions and the resulting impact.

Essential Functions

- Investigates liability, property, auto, general liability claims against and evaluates, processes, and manages liability, property, auto, general liability, and employment claims as assigned in compliance with state regulations for JPA-member school districts and charter schools.
- Conducts sensitive, confidential, and complex investigations, that may involve the highest level of potential liability (e.g. wrongful death or serious bodily injury; sexual harassment, molestation, etc.)
- Obtains items of evidence by identifying, locating, and interviewing witnesses; makes field sketches; prepares scene diagrams; takes photographs.
- Produces Custody Receipts for property taken as evidence; secures items and maintains chain of custody for items of evidence.
- Establishes effective working relationships with JPA-member districts and charter schools, management staff, employees, employee representatives, and representatives of outside agencies.
- Communicates effectively and calmly with diverse members of the public, including situations that may require a high degree of sensitivity, tact, and diplomacy.
- Coordinates pre-trial investigations with JPA panel defense counsel assigned to litigate claims.
- Assists JPA panel defense counsel assigned to litigate claims with formal discovery.
- Collects and analyzes information, data, and items of evidence for completeness, adequacy, and relevance.
- Prepares reports, factual recounts, correspondence, and documents in a clear, concise, detailed, and comprehensive manner.
- Provides testimony at trial and arbitration hearings and proceedings as required.
- Adjudicates auto and general liability claims for JPA member school districts (e.g., determining validity, reaching closure, etc.) for the purpose of complying with legal requirements and state statutes.

- Analyzes liability exposure for districts (e.g., Claims, etc.) for the purpose of ensuring correct action will take place.
- Attends legal hearings, district school board meetings, settlement conferences, mediations (e.g., meets with defense counselors, district defendants, JPA meetings with school districts, school board meetings, settlement conferences, mediations, etc.) for the purpose of providing testimony and monitoring proceedings.
- Delivers workshop training, information/instruction sheets, procedures, methods, etc. (e.g., JPA member school districts, etc.) for the purpose of addressing claims issues and negotiations.
- Evaluates auto and general liability claims for the purpose of establishing eligibility and course of action.
- Maintains claims files and records for the purpose of documenting actions and ensuring compliance with participating District policies and mandated legal requirements.
- Oversees the claims handling and third-party provider (e.g., litigation on complex cases and plans, etc.) for the purpose of ensuring the claims are being handled according to the legal regulations of the State of California.
- Prepares statistical summaries, evaluations and reports, oral presentations (e.g., for claims from \$99 to 5 million dollars, etc.) for the purpose of providing information and/or documenting activities.
- Processes claims submitted under the state provisions for the purpose of establishing eligibility and representing the participating district as eligibility hearings.
- Responds to inquiries from claimant, participating district and/or involved personnel (e.g., status of claim, subrogation activities, etc.) for the purpose of resolving issues, facilitating communication among parties and/or providing information or directions.
- Prioritizes and organizes workload; completes large numbers of work assignments within strict guidelines.

Other Functions

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Job Requirements: Minimum Qualifications

Knowledge and Abilities

KNOWLEDGE of:

Laws applicable to public entity liability claims; medical and legal terminology;

Industrial Insurance Laws;

Legal limitations on evidence collection including Federal and State laws establishing privileges and confidentiality of personal information histories;

Federal and State law applicable to personal privacy;

Investigative techniques and methods;

Rules of evidence and procedure applicable to civil litigation;

Techniques required for clear and accurate photographs of basic anatomy and physiology;

Business telephone etiquette;

Codes/laws/rules/regulations/policies;

Concepts of grammar and punctuation;

Office application software;

Practicing cultural competency while working collaboratively with diverse groups and individuals; SDCOE customer service objectives and strategies.

ABILITY to:

Analyze data utilizing defined but different processes;

Work with a significant diversity of individuals and/or groups;

Identify issues presented in claims;

Conduct effective interviews;

Secure evidence;

Analyze and project consequences of the release of information, decisions, and recommendations;

Recognize legal barriers to obtaining privileged or confidential information and discern whether alternate legal means to obtain such information;

Assess JPA member district and charter school needs to ensure they receive the needed service through personal service or appropriate referral;

Conduct contacts with representatives of member district/charter schools, outside agencies and members of the public with courtesy and respect;

Use effective communication both oral and written to communicate with diverse groups;

Work with frequent interruptions;

Work with detailed information/data;

Maintain confidentiality;

Establishing effective relationships;

Meet assigned deadlines.

Responsibility

Responsibilities include: working under limited supervision and/or working, leading, guiding and/or coordinating work with others. Using resources from other work units may be required. Maintain knowledge of changes to existing applicable Federal and State law.

Working Environment

The work primarily takes place in an office setting with exposure to computer screens. The work frequently takes place in the field and involves travel to urban, suburban, or rural locations within and outside of San Diego and/or California to perform investigations.

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 50% sitting, 25% walking, and 25% standing. This job is performed in a generally clean and healthy environment, but may require traveling rough terrain.

Experience: Five (5) years of full-time civil, criminal, or law enforcement investigation experience performing the full range of duties involved in the investigation of civil or criminal cases as an employee for a public agency or as a licensed private investigator or insurance claims adjuster. Experience with public liability claims, personal investigations, and traffic accident investigations is preferred.

Education: Bachelor’s degree in criminal justice, or closely related field.

Equivalency: A combination of education and experience equivalent to a bachelor’s degree in criminal justice, or closely related field; and five (5) years of full-time civil, criminal, or law enforcement investigation experience performing the full range of duties involved in the investigation of civil or criminal cases as an employee for a public agency or as a licensed private investigator or insurance claims adjuster.

Required Testing

N/A

Certificates

Private Investigator License with no record of discipline (if applicable)
Valid CA Driver’s License

Continuing Educ./Training

N/A

Clearances

Criminal Justice Fingerprint/Background Clearance
Proof of physical examination including TB Clearance

FLSA State: Exempt

Salary Range: Classified Management, Grade 38

Established: 7/2022

Approved by Personnel Commission: July 20, 2022

Revised: n/a