

JOB DESCRIPTION
San Diego County Office of Education

Claims Investigator

Purpose Statement

The job of Claims Investigator is done for the purpose/s of investigating liability, property, auto, general liability claims against member districts and charter schools of the Risk Management Joint Powers Authority (JPA); documenting activities; and conveying information regarding claims; and assists JPA defense panel attorneys with litigation in defense of member school districts, charter schools and their employees.

Essential Functions

- Investigate claims for JPA member school districts and charter schools.
- Conduct investigations that are sensitive, confidential, complex and may involve the highest level of potential liability (e.g. wrongful death or serious bodily injury; sexual harassment, molestation, etc.)
- Obtain items of evidence by identifying, locating and interviewing witnesses; makes field sketches; prepares scene diagrams; takes photographs.
- Produce Custody Receipts for property taken as evidence; secures items and maintain chain of custody for items of evidence.
- Establish effective working relationships with JPA member districts and charter schools, management staff, employees, employee representatives and representatives of outside agencies.
- Communicate effectively and calmly with diverse members of the public, including situations that may require a high degree of sensitivity, tact and diplomacy.
- Coordinate pre-trial investigations with JPA panel defense counsel assigned to litigate claims.
- Assist JPA panel defense counsel assigned to litigate claims with formal discovery.
- Collect and analyze information, data, and items of evidence for completeness, adequacy and relevance.
- Prepare reports, factual recounts, correspondence and documents in a clear, concise, detailed and comprehensive manner.
- Prioritize and organize workload; complete large numbers of work assignments with strict guidelines.
- Provide testimony at trial and arbitration hearing and proceedings as required.

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

Skills, Knowledge and Abilities

SKILLS are required to perform multiple, technical tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: operating standard office equipment including utilizing

pertinent software; planning and managing projects; resolving conflicts and diffusing hostile interchanges; and preparing and maintaining accurate records; classifying data and/or information. KNOWLEDGE is required to perform algebra and/or geometry; read technical information, compose a variety of documents, and/or facilitate group discussions; and solve practical problems. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: 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 and 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 is required to schedule a number of activities, meetings, and/or events; gather, collate, and/or classify data; and use basic, job-related equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using defined methods. Ability is also required to work with a significant diversity of individuals and/or groups; work with a variety of data; and utilize specific, job-related equipment. Independent problem solving is required to analyze issues and create action plans. Problem solving with data requires following prescribed guidelines; and problem solving with equipment is limited. Specific ability based competencies required to satisfactorily perform the functions of the job include: identifying issues presented in claims; problem solving; conducting effective interviews; securing evidence; analyze and project consequences of the release of information, decisions, and recommendations; recognizes 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, effective communication both oral and written; communicating with diverse groups; working with frequent interruptions; working with detailed information/data; maintaining confidentiality; establishing effective relationships; adapting to changing work priorities; accuracy and attention to detail; meeting deadlines and schedules; working as part of a team.

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 Job related experience within a specialized field is required.

Education Bachelors degree in job-related area.

Equivalency Bachelors degree in criminal justice, or closely related field. Five (5) years 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 is preferred.

Required Testing

Certificates

Private Investigator License with no record of discipline

Valid Driver's License & Evidence of Insurability

Continuing Educ./Training

Clearances

Criminal Background Clearance

Criminal Justice Fingerprint/Background Clearance

Drug Test

TB Screen

FLSA State: Exempt

Salary Range: Classified Management, Grade 35

Personnel Commission Approved: October 11, 2016