

## Claims Technician

FLSA Status: Covered  
Bargaining Unit: District Council of Trade Unions (DCTU)

### General Summary

Positions in this broad class research and process various types of claims made by or against the City.

### Claims Technician, Assistant - 30000065

#### Distinguishing Characteristics

The entry level of this class typically establishes files and completes forms related to claims, reviews and enters data, processes payment authorization and checks, and provides customer service. This class differs from other City classes in requiring knowledge and skill in claims processing.

#### Typical Duties/Examples of Work

1. Sets up new claim files; secures and determines claim data within established parameters; codes and enters data; prepares claims for adjusters.
2. Prepares, copies and distributes forms and other pertinent information as appropriate.
3. Coordinates with claimants and others regarding claims by phone or in person; may record very limited statements; answers inquiries and provides procedural advice; provides a variety of customer service assistance on the phone and in person.
4. Word-processes and proofreads a variety of correspondence, documents and ordinances; transcribes a variety of recorded statement and interview tapes.
5. Performs a variety of financial transactions, such as verifying and producing reimbursement and settlement checks, recording refunds, reimbursements and recoveries, processing payment authorizations, and verifying accounting data.
6. Provides a variety of administrative supports, such as opening and routing mail, and scheduling appointments.
7. Handles routine claims of limited complexity, such as medical only workers compensation claims, in accordance with Workers compensation law and

established internal procedures; refers problems to Adjusters or Claims Technicians.

- 8. Performs related duties as assigned.

**Required Knowledge, Skills and Abilities**

Knowledge of: medical and legal terminology; proper grammar, spelling and English usage; claims processing

Ability to: communicate effectively, orally and in writing; establish and maintain claim files; operate a variety of equipment such as personal computer, 10-key, recorder and transcriber; maintain confidentiality as appropriate; diffuse difficult situations; work effectively with co-workers in a diverse workforce, and respond appropriately to question/concerns from other employees and the public; record and verify financial and accounting data

Skill in: effective problem-solving; providing effective customer service; keyboarding

**Special Requirements**

None

**Classification History:**

Adopted: 2-03-99:

Class created as a result of DCTU Classification and Compensation Study 1998-99. This class is composed of the following classes:  
859 Assistant Claims Tech Adopted 08-17-84;  
Revised 09-10-90

June 2009 - Change Job Class number from 0858 to 30000065, due to system change.

**Claims Technician - 30000066**

**Distinguishing Characteristics**

The journey level of this class independently performs difficult, specialized paraprofessional claims management work by interacting with claimants and responsible parties to evaluate claims by or against the City and to settle claims or initiate collection processes, within defined limits but with a significant degree of accountability. It differs from the Assistant level by the authority to evaluate and settle claims of greater complexity.

**Typical Duties/Examples of Work**

1. Processes assigned claims from receipt through closure or resolution within defined limits.
2. Conducts interviews and records statements; Investigates claims; obtains information from pertinent City bureaus, employees, citizens and other sources to determine City responsibility for incident, action or exposure; issues claim denials or pays claims as appropriate.
3. Maintains contact and customer service with claimants and representatives.
4. Evaluates account claims for closure or collection; prepares disputed claims, defenses and exhibits for various adjudication forums; makes presentations of claims.
5. Negotiates claim settlements within defined limits; offers alternatives; acquires promissory notes.
6. Investigates third party liability claims; issues notices as appropriate; requests restitution or files claim of subrogation as appropriate.
7. Prepares and processes a variety of financial transactions, including establishing reserves in accordance with guidelines, receipting checks and crediting funds, coding payments, setting up payment schedules, securing repair estimates or documentation of damage, determining depreciation values.
8. Maintains files and records, and prepares reports.
9. Provides technical and administrative support to Claims Adjusters, team leaders and other professionals, as required by management.
10. Performs related duties as assigned.

**Required Knowledge, Skills and Abilities**

Knowledge of: legal processes in claims processing; insurance principles and worker's compensation laws and regulations if assigned to Worker's Compensation.

Ability to: negotiate to settle claims; account for financial transactions; maintain accurate records; investigate and evaluate claims related to injury or property loss; apply coverage; communicate clearly and concisely both orally and in writing.

Skill in: mathematics; developing and delivering effective presentations

**Special Requirements**

State of Oregon Worker's Compensation Claims Examiner Certification, or ability to obtain within 6 months from date of hire, if assigned to Worker's Compensation.

**Classification History:**

Adopted: 2-03-99:

Class created as a result of DCTU Classification and Compensation Study 1998-99. This class is composed of the following classes:

858 Claims Technician Adopted 02-16-82;

Revised 09-10-90

Revised 04-21-08 Added language to reflect the higher level responsibilities

June 2009 - Change Job Class number from 0859 to 30000066, due to system change.

**Working Conditions**

Work in this class is typically performed in an office environment. Incumbents are required to occasionally deal with distraught, upset and emotional claimants.