

Department of Consumer Affairs

Position Duty Statement

HR-41 (new 7/25)

Classification Title	Board/Bureau/Division
Management Services Technician	Medical Board of California
Working Title	Office/Unit/Section / Geographic Location
Management Services Technician	Probation – South
Position Number	Name and Effective Date
629-192-5278-001	

General Statement: Under the supervision of Staff Services Manager I (SSMI), the Management Services Technician (MST) is responsible for learning the less technical duties of monitoring a caseload of physicians whose licenses have been placed on probation as a result of a disciplinary order adopted by the Medical Board of California (Board). The MST monitors the physicians who reside in but are not practicing medicine in California (“pended”) or do not reside in California (“tolled”). It is critical to monitor probationers’ time spent not practicing medicine or not residing in California; most often this time does not count as time served to fulfill the probation terms and could possibly result in revocation of the physician’s California medical license. Duties include, but are not limited to, the following:

A. **SPECIFIC ASSIGNMENTS** [Essential (E) / Marginal (M) Functions]

50% Probation Case Management/Monitoring (E)

- Verifies probationer’s practice status every six month; communicates with probationers, other state regulatory boards, if the probationer is practicing medicine and/or being monitored; advises the probationers of the term and condition requirements of their disciplinary order regardless of their current employment situation. Compares compliance requirements and information provided by the physician to ensure compliance with the probationary order. **(15%)**
- Gathers and reviews all documentation received regarding the probationer’s current practice status to prepare a case summary of the probationer’s compliance with the terms and conditions of the disciplinary order including a narrative summary of the probationer’s current status, any outstanding issues, statements from the probationer or other related contacts, documents and evidence, and any recommended action or follow-up. Maintains case files. **(15%)**
- Reviews and interprets the disciplinary order, placing the physician on probation, to determine what terms and conditions must be met if the physician is in “pended” or “tolled” status. **(10%)**
- Initiates follow-up when probationers do not respond to requests for current status and/or documentation. Performs independent research to determine status of probationers; checks current California license status (renewed or canceled); searches obituaries; utilizes the internet. **(5%)**
- Prepares general correspondence to probationers, attorneys, state regulatory boards and others associated with the physician’s compliance with the disciplinary order. Responds, verbally or in writing, to probationer’s inquiries regarding the current probation status. **(5%)**

25% Receipt of Board Ordered Probation Costs (E)

- Independently reviews and reconciles payments (received from physicians on probation) for probation monitoring costs and costs associated with board-ordered medical and psychiatric evaluations; determines if the payment is for probation monitoring costs, and/or costs associated with board-ordered medical and psychiatric

evaluations types the payment into the BreZE System to record receipt of the payment ensuring the correct probationer and accurate costs are credited. Enters cost information into an Excel spreadsheet that is transmitted to cashiering with the accurate payment amount, licensee information, and appropriate compliance number to identify where the Cashiering Unit must apply the monies.

- Types probationer's annual notification letter to inform them of the costs due. Communicates with Inspectors and probationers regarding payment status and any outstanding costs due. Types background documentation for either the Attorney General or the Citation Program to support charging the probationer with a violation of probation for non-payment of board-ordered costs.

15% Compliance Issues (E)

- Monitors elapsed time the probationer has been in "pending" or "tolled" status to determine if the total time period meets the criteria to be considered a violation of probation. Prepares non-compliance referral report requesting either transmittal to the Office of the Attorney General for probation violation or for an automatic cancellation of the probationer's license. Gathers supporting documentation and submits package to the SSML to review prior to forwarding to the Staff Services Manager II.
- Reviews and evaluates reports and documentation submitted by probationers and other state regulatory boards to ensure probationer is in compliance with the terms and conditions of the disciplinary order. Identifies if the probationer has violated the order; gathers and preserves documentation and evidence; prepares report of non-compliance recommending referral for Citation and Fine or investigation; consults with Enforcement Management and/or Deputy Attorney General regarding atypical violations; submits non-compliance reports to the SSML.
- Cooperates with other state medical boards or investigators when a case has been filed by another state against a probationer by providing all requested documentation and reports. Testifies in court as a witness of fact if a probationer's violation results in an administrative or criminal action.

10% Administrative Tasks/Support Services (E)

- Provides general administrative support to the probation Unit; answers incoming telephone calls; orders supplies and equipment; reports attendance; reconciles CalCard statement; compiles and reconciles Inspector's vehicle mileage/usage logs, in accordance with the Department of General Services, and forwards to Board Headquarters.
- Maintains all closed probationer files; merges working files with the master file; purges all duplicative materials. Purges closed files consistent with the Board's record retention schedule. Reviews all probationers' records utilizing the Breeze database to ensure the codes entered are complete, accurate and reflect compliance with the terms and conditions of the disciplinary order or appropriate closing codes. Prepares caseload statistics to be used by the SSML during quarterly case reviews with Inspector I/II's.

B. Supervision Received

The incumbent works under the supervision of the SSML, Probation Unit.

C. Supervision Exercised

None.

D. Administrative Responsibility

None.

E. Personal Contacts

The incumbent has direct regular contact with other Board and Probation Unit staff regarding record and document gathering, meetings, consulting and probation monitoring processes, etc. The incumbent has direct continual contact with the SSML regarding casework. In addition, the incumbent has direct occasional contact with probationers and the Office of the Attorney General. The incumbent has direct

regular communication with other Board units including, but not limited to, the Licensing Program, the Administrative Services Unit, the Discipline Coordination Unit and the Central Complaint Unit.

F. Actions and Consequences

Failure to effectively monitor the “pending” and “tolled” probation caseload in a timely and efficient manner may result in allowing a violation of a probationer’s disciplinary order’s terms and conditions to go undetected. In addition, inadequate monitoring of probationers may result in non-compliant probationers continuing to violate the probationary terms and conditions.

G. Functional Requirements

No specific physical requirements are required: the incumbent works 40 hours per week in an office setting, with artificial light and temperature control. Daily access to and use of a personal computer and telephone is essential. Sitting and standing requirements are consistent with office work.

H. Other Information

The MST must manage a caseload of probation monitoring cases over extensive periods of time, develop strong organizational skills, and demonstrate effective verbal and written communication skills.

In all job functions, employees are responsible for creating an inclusive, safe, and secure work environment that values diverse cultures, perspectives, and experiences, and is free from discrimination. Employees are expected to provide all members of the public equitable services and treatment, collaborate with underserved communities and tribal governments, and work toward improving outcomes for all Californians.

The MST must be able to interpret and thoroughly explain applicable provisions of laws, regulations and disciplinary guidelines and policies; must exercise good communication skills; use good judgment in decision making; manage time and resources effectively; be able to work efficiently and cooperatively with others in a team setting or independently; and must be able to work under changing priorities and deadlines. The MST routinely works with sensitive and confidential issues and/or materials and is expected to maintain the privacy and confidentiality of documents and topics pertaining to individuals or to sensitive program matters at all times.

Title 11, section 703(d) California Code of Regulations requires criminal record checks of all personnel who have access to Criminal Offender Record Information (CORI). Pursuant to this requirement, applicants for this position will be required to submit fingerprints to the Department of Justice and be cleared before hiring. In accordance with DCA’s CORI procedures, clearance shall be maintained while employed in a CORI-designated position. Additionally, the incumbent routinely works with sensitive and confidential issues and/or materials and is expected to maintain the privacy and confidentiality of documents and topics pertaining to individuals or to sensitive program matters at all times.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with your supervisor. If unsure of a need for reasonable accommodation, inform the supervisor, who will discuss your concerns with the Health & Safety analyst.)

Employee Signature

Date

Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Printed Name

Updated: SB 07/2025
Approved: JM 3/25/16