

Duty Statement
Department of Managed Health Care

OFFICE: Help Center	EFFECTIVE DATE:
CLASSIFICATION: Office Technician	DATE APPROVED: May 11, 2026
POSITION: 409-301-1138-034	TELEWORK DESIGNATION: Remote-Centered
WORKING TITLE: Initial Review Technician	

DEPARTMENT OBJECTIVE:

The mission of the Department of Managed Health Care (DMHC) is to ensure health plan members have access to equitable, high-quality, timely, and affordable health care within a stable health care delivery system. The DMHC accomplishes its mission by ensuring the health care system works for members. The Department protects the health care rights of 30.2 million Californians by regulating health care service plans, assisting members through a member Help Center, educating members on their rights and responsibilities and preserving the financial stability of the managed health care system.

PROGRAM OBJECTIVE:

The DMHC Help Center educates members about their health care rights and resolves complaints against health plans to ensure a stable and accessible health care delivery system.

GENERAL DESCRIPTION:

Under the supervision of the Supervisor I, the Office Technician will be responsible for performing a variety of clerical, administrative, and supportive functions of the Initial Review Unit (IRU) within the Initial Review Section (IRS).

TYPICAL DUTIES:

Employee must be able to perform the following duties with or without reasonable accommodation.

PERCENTAGE JOB DESCRIPTION

Essential (E)/Marginal (M)

50% (E) Generate and email the Request for Health Plan Information and complaint documents received from enrollees to health plans. Close cases that do not contain enough information required for processing or do not fall under the jurisdiction of the DMHC. Communicate with enrollees and health plan representatives, to obtain and verify contact information, health plan name and

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member identification number. Fostering and supporting Health Insurance Portability and Accountability Act (HIPAA) processes. Ensure the DMHC database reflects the unique details of the complaint, health plan response, including entering accurate data on each data-tab. Monitor the incoming health plan response queue in the Customer Relations Management (CRM) database. Attach health plan responses to the corresponding case using the appropriate naming convention and log receipt of the response into the CRM. Follow established Help Center procedures for securing the translation of written documents. Monitor the ICB Outgoing mail inbox to ensure hardcopy mail is delivered to the mailroom accurately and timely.

45% (E) Prepare correspondence and close complaints reviewed by the IRU analysts which do not contain sufficient information required for initial review processing.

5% (M) Create new cases in response to management direction and additional correspondence. Provide feedback to management regarding program and process improvement. Participate in training, team meetings and one-on-one meetings.

SUPERVISION EXERCISED OVER OTHERS:

Does not supervise others.

KNOWLEDGE, ABILITIES AND ANALYTICAL/SUPERVISORY REQUIREMENTS:

The employee should be familiar with DMHC mission, goals, organizational structure and major work programs. The employee must also have a demonstrated positive attitude and a commitment to conduct business in a professional manner in dealing with the public and department clients and provide quality customer service to all customers, and be able to deal tactfully, professionally and confidentially with all internal and external customers and contacts. In addition, the employee must:

Have knowledge of: Modern office methods, supplies and equipment; business English and correspondence; principles of effective training.

Have the ability to: Perform difficult clerical work, including ability to spell correctly; use good English; make arithmetical computations; operate various office machines; follow oral and written directions; evaluate situations accurately and take effective action; read and write English at a level required for successful job performance; make clear and comprehensive reports and keep difficult records; meet and deal tactfully with the public; apply specific laws, rules and office policies and procedures; prepare correspondence independently utilizing a wide knowledge of vocabulary, grammar and spelling; communicate effectively; provide functional guidance.

CONSEQUENCE OF ERROR/RESPONSIBILITY FOR DECISIONS:

The employee may have access to very sensitive and confidential information. Careless, accidental or intentional disclosure of information to unauthorized people can have far-reaching effects, which may result in civil or criminal action against those involved.

PHYSICAL, MENTAL AND EMOTIONAL REQUIREMENTS:

Employees may be required to sit for long periods of time using a keyboard and video display terminal or traveling in a vehicle to other locations; must be able to organize and prioritize their work under deadline situations and adapt behavior and work methods in response to new information, changing conditions or unexpected obstacles; will be involved with sustained mental activity needed for analysis, reasoning and problem solving; must be able to develop and maintain cooperative working relationships, recognize emotionally charged issues, problems or difficult situations and respond appropriately, tactfully and professionally; and must be able to work independently. The employee must be able to create/proactively support a work environment that encourages creative thinking and innovation; understand the importance of good customer services and be willing to develop productive partnerships with managers, supervisors, other employees, and, as required, control agencies and other departments.

WORK ENVIRONMENT:

The DMHC utilizes a hybrid telework model to provide all employees with an avenue to telework while ensuring business and operational needs are met.

Remote-Centered employees are expected to maintain a safe and distraction free work environment at the approved alternate work location. Remote-Centered employees agree to adhere to the state telework policy, the DMHC's telework policy, and conditions cited in the Telework Agreement (STD 200).

Office-Centered employees are expected to maintain a dedicated workstation at a DMHC official worksite. Office-Centered employees are expected to work in a climate-controlled office or cubicle under artificial lighting.

POSITION REQUIREMENTS:

This position requires the incumbent maintain consistent and regular attendance; communicate effectively (orally and in writing if both appropriate) in dealing with the public and/or other employees; develop and maintain knowledge and skill related to specific tasks, methodologies, materials, tools and equipment; complete assignments in a timely and efficient manner; and, adhere to departmental policies and procedures regarding attendance, leave, and conduct.

Note: Any business travel reimbursements will be done in accordance with the approved applicable Memorandum of Understanding (MOU).

ADDITIONAL REQUIREMENTS:

None.

SIGNATURES:

The statements contained in this duty statement reflect details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise to balance the workload.

State of California
Health and Human Services Agency
Department of Managed Health Care
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Employee: I have read and understand the duties listed above and can perform them with/without Reasonable Accommodation (RA). *(If you believe you may require Reasonable Accommodation, please discuss this with the hiring supervisor. If you are unsure whether you require Reasonable Accommodation, inform the hiring supervisor, who will discuss your questions and/or concerns with the RA Coordinator.)*

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

EMPLOYEE NAME (PRINT)		SUPERVISOR NAME (PRINT)	
Employee's Signature	Date	Supervisor's Signature	Date