

**Department of Health Care Access and Information
Duty Statement**

Employee Name Vacant	Organization Office of Health Information Enterprise Data Operations Branch Utilization and Disclosure Reporting Section Utilization and License Data Unit 
Position Number 441-507-5393-XXX	Telework Option Hybrid
Classification Analyst II	Working Title Advanced Utilization Report Analyst
Supervision Exercised None	Location Sacramento
Conflict of Interest: Yes ☐ No ☒	Fingerprint/Live Scan: Yes ☐ No ☒
Revision Date April 2026	Effective Date April 2026

Mission and Vision

HCAI is a leader in collecting data and disseminating information about California's healthcare landscape, promoting an equitably distributed health workforce, and publishing valuable information. The Department does this through five program areas - Affordability, Workforce, Data, Facilities, Financing.

HCAI's mission is to expand access to quality, equitable, affordable health care for all Californians by supporting high value delivery systems, resilient health facilities and workforces, and actionable health information and strategies.

HCAI's vision is a healthier California where all receive equitable, affordable, and quality health care.

General Description

Under the direction of the Supervisor I within the Office of Health Information (OHI), the Analyst II will act as advanced analyst and perform the most complex analytical tasks and technical assistance associated with the automated systems for collecting, validating, and disseminating annual utilization reports from licensed clinics and other health facilities for the Office. The incumbent will support the Utilization and Disclosure Reporting Section by conducting special analytical studies and serve as liaison with other Sections and Offices. The incumbent will also be responsible for leading and coordinating stakeholder engagements and meetings. Through stakeholder feedback, assess the impact and provide implementation recommendations. Lastly, this position will also provide support for the more complex analysis of utilization reports and technical assistance.

In the Department of Health Care Access and Information (HCAI) work environment staff may handle confidential data. Specific statutes and regulations and HCAI policies and procedures govern the

Department of Health Care Access and Information

Duty Statement

collection, storage, disclosure and use of confidential data. The employee is responsible for the safe and secure handling of this data in compliance with these policies and procedures.

Essential Job Functions

25% Desk Audit of Annual Utilization Reports

Audit Annual Utilization Reports submitted by licensed hospitals, long-term care facilities, home health agencies, and hospices, with primary focus on primary care clinics and specialty clinics, that contain the most complex reporting errors and problems. Identify and analyze complex edit reports and reporting errors. Prepare updates to the instructions and documents based on the desk auditing experience. Assist facilities in resubmitting complex reports that require revisions. Resolve complex reporting errors via oral or written correspondence with individuals that prepare the reports. Compare submitted data with previously submitted report data. Prepare training programs and present at training seminars on the Annual Utilization Reporting system for internal and external users, with a concentration on clinic reports. Assist and train staff in resolving difficult reporting errors and problems that require in-depth analysis.

20% Analysis and Statewide Utilization Data File Preparation

Conduct analytical studies on the State Utilization Data File to identify systemic changes in the healthcare industry and to make recommendations on the Annual Utilization Reporting system design documentation to capture these changes. Extract and prepare Statewide Utilization Data File for each of the facility types, with a concentration on clinics for publication on the Open Data Portal. Analyze the State Utilization Data File using statistical tools to determine if data movements have occurred. Assist supervisor in final verification of Statewide Utilization Data File. Coordinate the web publication of the Statewide Utilization Data Files with website authors/editors and Open Data Portal liaison. Document the anomalies and prepare recommendations on changes to the Annual Utilization Reporting system design documentation to address the issues. Draft modifications to the Annual Utilization Report as well as the logic modifications to the Annual Utilization Reporting system design documentation that would accompany any data element changes. Consult with IT programmers to assure that the changes to the Annual Utilization Reporting system design documentation can be implemented. Coordinate each logic change in the Annual Utilization Reporting system design documentation through the design/implementation/testing/ final approval process. Implement error code onto Annual Utilization Reporting system Edit Rules page.

20% Annual Utilization Reporting Cycle Preparation

Consult with external stakeholders and communicate any proposed changes to the clinic reports and other Annual Utilization Reports. Formulate reporting and auditing procedures that will ensure submission of accurate data in the Annual Utilization Reporting system. Meet and consult with stakeholder groups regarding proposed changes to the clinic reports and other Annual Utilization Reports. Includes reviewing changes and revisions to clinic reports and other Annual Utilization Report forms and instructions. Analyze complex system malfunctions and determine if the

Department of Health Care Access and Information Duty Statement

problem was due to program logic errors, faulty manual processes, or erroneous external data. Explain the need for the proposed change and prepare the documentation that will justify the proposal. Prepare incident reports and follow-up with its implementation and testing of the system malfunctions. Note any concerns, conduct research on these issues, and prepare a recommendation on the objections for management. Draft changes to report forms, manual/documentation, and processes using feedback from stakeholders. Negotiate with stakeholders on technical issues. Complete functionality, edit, and extractor tests prior to implementing changes to Annual Utilization Reporting system and made available to the public for report submission. Draft and process correspondence to non-registered and non-responder facilities. Coordinate follow-up efforts with the non-responders with other analysts. Compiles "contact list" of non-responders for follow-up by other analysts. Provide assistance with the updates and maintenance of HCAI's health facility license information system. Consult with IT programmers in testing SIERA and the Licensing Facility Information System to ensure the system licensing information is captured accurately with licenses received from other state departments. Update Licensed Facility system with the applicable information where appropriate. Perform inactive primary contact and additional user account clean-up as needed to maintain most up-to-date contact information.

20% Technical Support for Clinics and other Annual Utilization Reports

Respond to minor to highest complexity level inquiries from health facility personnel regarding the annual utilization reporting requirements and the online user accounts, which include login IDs, passwords, new accounts, and updates to existing profiles. Draft modifications to the clinic's report and other Annual Utilization Report, as well as the logic modifications or new edit/flags to the system design documentation. Work collaboratively with IT programming staff and/or lead program analyst to ensure that the changes can be implemented; and coordinating each logic change in the system design documentation through testing and implementation. Maintain accurate data in the facility licensing and Annual Utilization Reporting systems, including establishing or correcting the facility licensing information. Support the analysis of clinic reports and other utilization reports for compliance with required reporting, and identification of possible errors. Provides technical assistance to public data users and other stakeholders regarding technical details of utilization reports and the proper use of this information.

10% Formulate and Implement Data Quality Assurance Procedures

Review and monitor the Annual Utilization Reporting system to assure that transparent and accurate data are being submitted and published. Analyze complex reporting errors and determine if the problems were due to program logic errors, faulty manual processes, or erroneous external data. Monitor program staff's progress to ensure we follow reporting timelines and milestones. Make recommendations to management on how to fix the problem. Collaborate with Research Scientists from the Health Analytics Branch (HAB) and other program staff on report data and Data De-identification implementation and review. Coordinate the changes with program staff and stakeholders.

**Department of Health Care Access and Information
Duty Statement**

Marginal Job Functions

5% Miscellaneous

Work on special projects as defined by management. This could include preparing special ad hoc reports for management, conducting bill analysis, assisting in training new staff, and other duties as required.

Desirable Qualifications

- Demonstrate a commitment to performing duties in a service-oriented manner.
- Demonstrate a commitment to building an inclusive work environment that promotes HCAI's diversity, equity, and belonging where employees are appreciated and comfortable as their authentic selves.
- Demonstrate a commitment to maintaining a work environment free from workplace violence, discrimination, and sexual harassment.
- Demonstrate a commitment to HCAI's Mission, Vision, and Goals.
- Demonstrate a commitment to HCAI's Core Values and Guiding Principles.
- Maintain good work habits and adhere to all HCAI policies and procedures.

Physical Demands

Must possess and maintain sufficient strength, agility, endurance, and sensory ability to perform the duties contained in this duty statement with or without reasonable accommodation.

Working Conditions

Requires use of computing devices and phones, frequent face-to-face contact with management, staff, consultants and the public, verbal, written and digital (e-mail) communication, extensive review, analysis and preparation of electronic and written documents, assessment of practical demonstrations, mobility to various areas of the Department, occasional travel and overnight stays to training/conferences or the Los Angeles field office may also be required, and work hours may deviate from core business hours based on the service requirements of the Department.

Employee Statement

I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of this duty statement.

Employee Name	Employee Signature	Date Signed

Supervisor Statement

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

Supervisor Name	Supervisor Signature	Date Signed

**Department of Health Care Access and Information
Duty Statement**

Employee Name Vacant	Organization Office of Health Information Enterprise Data Operations Branch Utilization and Disclosure Reporting Section Utilization and License Data Unit 
Position Number 441-507-5157-XXX	Telework Option Hybrid
Classification Analyst I	Working Title Utilization Report Analyst
Supervision Exercised None	Location Sacramento
Conflict of Interest: Yes ☐ No ☒	Fingerprint/Live Scan: Yes ☐ No ☒
Revision Date April 2026	Effective Date April 2026

Mission and Vision

HCAI is a leader in collecting data and disseminating information about California's healthcare landscape, promoting an equitably distributed health workforce, and publishing valuable information. The Department does this through five program areas - Affordability, Workforce, Data, Facilities, Financing.

HCAI's mission is to expand access to quality, equitable, affordable health care for all Californians by supporting high value delivery systems, resilient health facilities and workforces, and actionable health information and strategies.

HCAI's vision is a healthier California where all receive equitable, affordable, and quality health care.

General Description

Under the supervision of the Supervisor I within the Office of Health Information (OHI), the Analyst I will perform analytical tasks and provide technical assistance associated with the automated systems for collecting, validating, and disseminating annual utilization reports from licensed health facilities for the Office. The incumbent will support the Utilization and Disclosure Reporting Section by conducting analytical studies and serve as liaison with other Sections and Offices. The incumbent will participate and engage with stakeholders regarding various topics related to facility license information and annual utilization reporting. Through stakeholder feedback, assess the impact and provide implementation recommendations. Lastly, this position will also provide support for the minor to standard complexity analysis of utilization reports and technical assistance.

In the Department of Health Care Access and Information (HCAI) work environment staff may handle confidential data. Specific statutes and regulations and HCAI policies and procedures govern the collection, storage, disclosure and use of confidential data. The employee is responsible for the safe and secure handling of this data in compliance with these policies and procedures.

Department of Health Care Access and Information Duty Statement

Essential Job Functions

30% Desk Audit of Annual Utilization Reports

Audit Annual Utilization Reports submitted by licensed hospitals, long-term care facilities, primary care clinics, specialty clinics, home health agencies, and hospices that contain minor to moderate reporting errors and problems. Analyze edit reports and identifying reporting errors. Prepare updates to the instructions and documents based on the desk auditing experience. Assist facilities in resubmitting minor to intermediate complexity reports that require revisions. Resolve minor to standard complexity by reporting errors via oral or written correspondence with individuals that prepare the reports. Compare submitted data with previously submitted report data. Update and correct the report data as needed via utilization report system. Document corrections and comments provided by facility personnel.

25% Data Analysis and Statewide Utilization Data File Preparation

Conduct analytical studies on the State Utilization Data File to identify systemic changes in the healthcare industry and to make recommendations on the Annual Utilization Reporting system design documentation to capture these changes. Assist in extraction and preparation of Statewide Utilization Data File for each facility type for publication on the Open Data Portal. Analyze the Statewide Utilization Data File for each of the facility types using statistical tools to determine if data trends have changed. Document the anomalies and prepare recommendations on how to change the system design documentation to address the issues. Prepare, update, revise, and correct facility and utilization information posted on the Department of Health Care Access and Information website. Draft modifications to the Annual Utilization Report as well as the logic modifications to the system design documentation. Consult with IT programmers and advanced analysts to assure that the changes to the system design documentation can be implemented to the Annual Utilization Reporting system.

20% Annual Utilization Reporting Cycle Preparation

Consult with external stakeholders and communicate any proposed changes to the Annual Utilization Reports. Assist Analyst II with formulating reporting and auditing procedures that will ensure submission of accurate data in the Annual Utilization Reporting system. Attend meetings with stakeholders regarding proposed changes to the Annual Utilization Report. Includes updating the report forms and instructions for all changes and participating in training seminars on the Annual Utilization Reporting system. Analyze application malfunctions and determine if the problem was due to program logic errors, faulty manual processes, or erroneous external data. Explain the need for the proposed change and prepare the documentation that will justify the proposal. Assist in preparing incident reports and follow-up with its implementation and testing of the system malfunctions. Complete functionality, edit, and extractor tests prior to implementing changes to Annual Utilization Reporting system and made available to the public for report submission. Prepare and coordinate the communications process with the licensed healthcare facilities that are subject to submitting data using Annual Utilization Reporting system. Process

Department of Health Care Access and Information Duty Statement

over 10,000 notification letters to Annual Utilization Reporting system primary contacts informing them of the upcoming reporting cycle. Includes following-up on returned notices and updating the report contact information in Annual Utilization Reporting system. Draft and process correspondence to non-registered and non-responding facilities. Coordinate follow-up efforts with the non-responders with other analysts. Compiles "contact list" of non-responders for follow-up by other analysts. Assist with the updates and maintenance of HCAI's health facility license information system. Assist advanced analyst and IT programmers in testing of the SIERA Licensing Facility Information System to ensure the system licensing information is captured accurately with licenses received from other state departments. Update Licensed Facility system with the applicable information where appropriate. Perform inactive primary contact and additional user account clean-up as needed to maintain most up-to-date contact information.

15% Technical Support for Annual Utilization Reports

Respond to minor to standard complexity level inquiries from health facility personnel regarding the annual utilization reporting requirements and the online user accounts, which include login IDs, passwords, new accounts, and updates to existing profiles. Draft modifications to the Annual Utilization Report as well as the logic modifications or new edit/flags to the system design documentation. Work collaboratively with IT programming staff and/or lead program analyst to ensure that the changes can be implemented; and coordinating each logic change in the system design documentation through testing and implementation. Maintain accurate data in the facility licensing and Annual Utilization Reporting systems, including establishing or correcting the facility licensing information. Support the analysis of utilization report for compliance with required reporting, and identification of possible errors. Provides technical assistance to public data users and other stakeholders regarding technical details of utilization reports and the proper use of this information.

5% Formulate and Implement Data Quality Assurance Procedures

Review and monitor the Annual Utilization Reporting system to assure that transparent and accurate data are being submitted and published. Analyze reporting errors and determine if the problems were due to program logic errors, faulty manual processes, or erroneous external data. Monitor program staff's progress to ensure we follow reporting timelines and milestones. Make recommendations to management on how to fix the problem. Assist the Analyst II in collaboration with Research Scientists from the Health Analytics Branch (HAB) and other program staff on report data and Data De-identification implementation and review. Assist in coordinating the changes with program staff and stakeholders.

Marginal Job Functions

5% Miscellaneous

Work on special projects as defined by management. This could include preparing special ad hoc reports for management, conducting bill analysis, assisting in training new staff, and other duties as required.

**Department of Health Care Access and Information
Duty Statement**

Desirable Qualifications

- Demonstrate a commitment to performing duties in a service-oriented manner.
- Demonstrate a commitment to building an inclusive work environment that promotes HCAI's diversity, equity, and belonging where employees are appreciated and comfortable as their authentic selves.
- Demonstrate a commitment to maintaining a work environment free from workplace violence, discrimination, and sexual harassment.
- Demonstrate a commitment to HCAI's Mission, Vision, and Goals.
- Demonstrate a commitment to HCAI's Core Values and Guiding Principles.
- Maintain good work habits and adhere to all HCAI policies and procedures.

Physical Demands

Must possess and maintain sufficient strength, agility, endurance, and sensory ability to perform the duties contained in this duty statement with or without reasonable accommodation.

Working Conditions

Requires use of computing devices and phones, frequent face-to-face contact with management, staff, consultants and the public, verbal, written and digital (e-mail) communication, extensive review, analysis and preparation of electronic and written documents, assessment of practical demonstrations, mobility to various areas of the Department, occasional travel and overnight stays to training/conferences or the Los Angeles field office may also be required, and work hours may deviate from core business hours based on the service requirements of the Department.

Employee Statement

I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of this duty statement.

Employee Name	Employee Signature	Date Signed

Supervisor Statement

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

Supervisor Name	Supervisor Signature	Date Signed