

Duty Statement
Department of Managed Health Care

OFFICE: Help Center – Data Analytics Section	EFFECTIVE DATE:
CLASSIFICATION: Research Data Specialist II	DATE APPROVED: June 4, 2026
POSITION: 409-173-5758-003	TELEWORK DESIGNATION: Remote-Centered
WORKING TITLE: Help Center Staff Data Specialist II	

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 general direction of the Research Data Supervisor II (RDSup II) over the Help Center’s Data Analytics Section (DAS), the Research Data Specialist II (RDSpec II) will perform the more complex data analysis related to Help Center consumer and provider complaint data and other data sources in response to ad-hoc research and reporting requests. The RDSpec II will work on special projects requested by senior and executive management, coordinate legislative bill analyses and analyze impact, develop novel methods to analyze data, and collaborate with various stakeholders to solve business problems using data.

TYPICAL DUTIES:

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

<u>PERCENTAGE</u>	<u>JOB DESCRIPTION</u>
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Essential (E)/Marginal (M)

35% (E)

Function as a subject matter expert in Help Center consumer and provider complaint data to perform the more complex and innovative statistical and data analyses where standard methodologies may not yet exist.
 Using business intelligence software and tools, including but not limited to Excel, SQL, Power Query, DAX, and Power BI.

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Respond to ad hoc research and analysis requests by senior and executive management. Using Word, PowerPoint, and Power BI, concisely communicate and produce executive summaries and reports of assigned research projects in a manner understood by a wide audience with varying ranges of expertise. Ensure that data containing personal characteristics or unique identifiers that will be reported publicly is sufficiently de-identified before release. Ensure data reports are reader accessible in accordance with Government Code 11135.

35% (E)

Independently research and develop methodologies to identify, collect, structure, validate, model, and analyze data to solve business problems related to various topics, including health plan compliance, health equity, impact of proposed regulations and legislation, and measurement of workflow processes. Using Excel, SQL, Power Query, DAX, and Power BI, work with and train other data analysts and relevant stakeholders to implement new methodologies into regular and customized reports to analyze and monitor trends. Create workflow diagrams and document procedures for the collection and reporting of the data. Continually re-evaluate the efficiency and effectiveness of the reports and work with management to ensure their data reporting needs are met.

15% (E)

Work with the Department's Office of Financial Review and Office of Plan Monitoring by analyzing Help Center data to identify trends and anomalies responsive to the Department's financial and medical surveys of health plans. Collaborate with other offices within the Department, contractors, other state entities, or other external stakeholders to advance initiatives relating to health plan compliance and health equity that require data analytic work. Work with the Department's Office of Technology and Innovation to ensure that the Help Center's database and business intelligence needs are met.

10% (E)

Collaborate with other program areas within the Help Center and offices within the Department to review legislative bill analyses. This includes conducting analysis on Help Center data, providing subject matter expertise, additional research on the possible impact of legislation to the Help Center.

5% (M)

Run and share established timely reports. Respond to ad-hoc data requests. Represent the Department in meetings, workgroups, and presentations. May serve as a Statistical Data De-Identification Expert. May serve as Acting Research Data Supervisor II in their absence.

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

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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 the knowledge of: Data analysis methods and techniques including gathering and collection of structured and unstructured data, as well as general principles, concepts and terminology used in research; planning studies and investigations; trend analysis procedures; time management techniques to provide for efficient prioritization and completion of projects and assignments; software to prepare spreadsheet summaries, reports, charts, and tables; basic arithmetic and statistical techniques to analyze numerical data; and departmental policies and procedures. Design and implement research-related projects; practices required to ensure and maintain data security, including securely transmitting confidential data; experimental design procedures; problem-solving techniques and processes to identify and resolve issues related to the completion of work assignments; and advanced mathematical techniques and descriptive statistical analysis techniques and methods. Principles and concepts applied in research and statistical settings; principles and concepts appropriate to data and research techniques and methodologies; operations research methods; current data analytics processes, including the utilization of business intelligence software programs; broad principles of algorithms, data structures, and data management; application of computerized models to research data, statistical and other methods used in the analysis; survey methods and analytical techniques; organizational analysis including data presentation and interpretation; principles and procedures of forecasting, and of research planning, design, methodology; problem solving techniques and processes to facilitate the identification and resolution of issues related to the completion of work assignments. State, federal and departmental regulations; benefit-cost analysis; complex database design and structure to understand and complete research projects and assignments; and project management principles to design projects (e.g., define schedules, tasks, milestones, deliverables).

Have the ability to: Research, gather, compile, and analyze structured and unstructured data; conduct and interpret descriptive statistical analyses using appropriate software to test research hypotheses and to formulate conclusions and recommendations; prepare research and statistical reports; analyze written and numerical data regarding general governmental problems; speak and write effectively; develop and evaluate alternatives, recommendations, solutions, and conclusions or approaches to research problems; manage a workload consisting of multiple projects and assignments; complete work under critical timelines to meet project objectives and deadlines; be objective and flexible to adapt to changes in priorities and work assignments; and gain and maintain the confidence and cooperation of others, collaborate, and work in multidisciplinary teams. Query, mine, analyze, and manipulate data; communicate effectively both orally and in writing to individuals and groups related to the area of research; present ideas and information effectively; adapt and apply formal research methods and principles to research problems; design and validate studies and analyze the accuracy of data collected; analyze quantitative and qualitative data to reach sound conclusions and/or make recommendations; identify improvements and originate and develop new solutions which depart from traditional and existing patterns; identify required data, information, materials, and resources needed to complete/perform a project; reason logically and creatively and use a variety of analytical techniques to resolve or provide information

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regarding complex research and data problems; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas;

recognize when issues, activities, and/or decisions need to be elevated to management and communicate information effectively to others. Plan and carry out large scale research and data projects; prepare and present reports and data models; adapt and apply complex research methods and principles to research problems of an applied practical nature; identify required data, information, materials, and resources needed to complete/perform a project; identify data needs of complex analyses and evaluate adequacy of existing data to meet these needs; develop procedures for collection and integration of data sources; design and test complex data base structures for storage and manipulation; access and process data located on large databases, servers, mainframes and/or desktop computers; design and conduct a complex research project and/or validating studies; conduct program evaluation studies including the systematic analysis of program requirements, goals, and outcomes to ensure program effectiveness; analyze and evaluate the impact of programs, procedures, business processes, and/or policies; develop documents related to data processing and analysis procedures for research projects and assignments to be used as a future resource; determine how a system or process works and how utilizing new inputs, operations, and environmental conditions would affect outcomes; function as a technical lead for complex projects to ensure timely completion; provide technical assistance to professional personnel; establish and maintain cooperative relationships with others, and with stakeholders; communicate with internal and external stakeholders with diplomacy and tact, especially concerning difficult and sensitive issues. Translate legislatively mandated program evaluation requirements into methodically rigorous study designs; translate departmental policy into action programs and/or test the impact of policy changes; evaluate the adequacy and merit of proposed research and evaluation study designs and techniques; provide expert consultation on the feasibility impact or potential of a variety of operations, projects or proposals to the department and to other organizations; analyze and evaluate the impact of changes to existing programs, procedures, business processes, and/or policies; use creativity when independently designing research projects; and write clear and concise studies and reports; design and develop research methodologies required to ensure the collection and analysis of appropriate, meaningful, and unbiased data; conduct and interpret descriptive and/or inferential statistical analyses using appropriate software to test research hypotheses and to formulate conclusions and recommendations; analyze situations accurately and take effective action at the appropriate time; and provide mentoring to staff.

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

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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 made in accordance with the approved applicable Memorandum of Understanding (MOU).

ADDITIONAL REQUIREMENTS:

This position is required under the DMHC's Conflict of Interest Code to complete and file a Form 700 within 30 days of appointment and annually thereafter.

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.

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.)*

State of California
Health and Human Services Agency
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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