

## Duty Statement

### Department of Managed Health Care

<b>OFFICE:</b> Office of Plan Monitoring	<b>EFFECTIVE DATE:</b>
<b>CLASSIFICATION:</b> Health Program Specialist II	<b>DATE APPROVED:</b> June 17, 2026
<b>POSITION:</b> 409-571-8336-028	<b>TELEWORK DESIGNATION:</b> <i>Remote-Centered</i>
<b>WORKING TITLE:</b> Medical Surveys Specialist	

#### **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 consumers. The Department protects the health care rights of 30.2 million Californians by regulating health care service plans, assisting consumers through a consumer Help Center, educating consumers on their rights and responsibilities and preserving the financial stability of the managed health care system.

#### **PROGRAM OBJECTIVE:**

The Office of Plan Monitoring (OPM) is responsible for evaluating and ensuring health plan service plan regulatory compliance, quality improvement, and network adequacy as related to provision of managed health care services. The Division's public health and legal professionals plan and conduct routine and non-routine evaluations of licensed health plans and review service delivery filings for legal adequacy in order to ensure enrollees receive appropriate sufficient, and timely care.

#### **GENERAL DESCRIPTION:**

Under the general direction of the Office of Plan Monitoring, (OPM), Division of Plan Surveys (DPS), Supervisor II, the incumbent performs high profile, sensitive and complex specialized assignments involving broad policy issues resulting in a statewide impact to health plans, providers and consumers in support of efficient and effective regulatory oversight of licensed health plans. The incumbent functions as a highly skilled independent program consultant who performs high profile, sensitive and complex, specialized duties to implement regulations which have significant statewide impact on the Department's health plan medical survey efforts pursuant to the Knox-Keene Health Care Service Plan Act of 1975.

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Responsibilities include project management; formulating recommendations for implementing new legislation and regulation, Department initiatives; planning, organizing, and conducting medical surveys of health care service plans; and organizing and leading project teams to respond to changes in regulations and Department directives as they impact DPS and other Offices. The incumbent reviews license applications and amendments, conducts statutorily mandated surveys (operational audits), as well as non-routine and investigative medical surveys of licensed health care service plans.

**TYPICAL DUTIES:**

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

**PERCENTAGE**      **JOB DESCRIPTION**

Essential (E)/Marginal (M)

**35% (E)**

Plan, organize, and conduct the most complex medical surveys of health care service plans leading and directing the efforts of clinical consultants and department analysts to determine health plan compliance with Knox-Keene Health Care Service Plan Act and Title 28 regulations as directed by management and according to the survey schedule. Prepare, edit, and format reports resulting from regulatory survey activities using Division policies, procedures, and templates to present findings of medical survey activities. Provides guidance and technical expertise to clinical consultants and DPS analysts as in-house subject matter expertise responsible for performing the most difficult and complex work pertaining to program issues to ensure effective oversight of licensed health plans. Work directly with the division's legal staff in reviewing health care service plan license applications, policies and procedures, and other health plan information to determine health plan compliance with existing and newly enacted statutes and regulations.

**30% (E)**

Exercise lead responsibility for the analysis and evaluation of health plan documents related to applications, amendments, and material modifications to determine compliance with the Knox-Keene Health Care Service Plan Act and Title 28 regulations and other applicable laws and statutes. Make recommendations on and implement revisions to assessment tools, Division policies, regulations, procedures, and check lists as directed by management. Independently prepare the most complex written analysis, referrals, and/or management memorandums to communicate health plan deficiencies and compliance efforts. Provide leadership and assistance in the development and implementation of broad internal policies and procedures necessary to achieve effective assessment and oversight of health care service plan operations utilizing good judgment, available data, and information, under the direction of management.

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- 20% (E)** Develop continuing education programs to train colleagues and clinical consultants in the review and assessment of health plan operations and delivery systems resulting from implementation of new legislation, regulations, All Plan Letters, and Department policy. Review and analyze proposed health care legislation to determine operational and fiscal impact to the Division, utilizing analytical skills and Division analysis workload estimates as directed by management. Oversees consultant vendor performance.
- 10% (E)** Develops and compiles reports regarding health care access issues and proposals for best practice policy enhancements for Division of Plan Surveys review of health plans' delivery of pharmacy and other health care benefits for DMHC's management and executives and for other agencies, as requested. Prepares Director's Office briefings regarding Medical Surveys and associated issues. Drafts Medical Survey review summaries and findings related to the implementation of legislation and regulations for OPM's management and Director's Office.
- 5% (M)** Represent the Division with stakeholders to provide information, and to collaborate and assess health plan compliance with Knox-Keene Health Care Service Plan Act and Title 28 regulations as directed by management.

**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 the ability to reason logically and use analytical techniques to solve difficult problems; research, understand, interpret and articulate applicable laws, rules and regulations; analyze and apply legal principles and precedents to particular sets of facts; provide clear, concise, and effective written documentation and oral presentation.

Knowledge of: Public health, mental health and health care services programs and trends; problems and procedures involved in establishing community relationships and assessing community health program needs and resources; preparation and planning for coordinated programs with local and Federal agencies, private agencies and health care providers; principles and methods of public administration including organization, personnel and fiscal management; methods of preparing reports; research and survey methods; methods and principles of medical care administration, disease and disability prevention, health promotion and medical rehabilitation; procedures, planning, implementation and monitoring of programs;

design and plan for coordination of programs with Federal and local agencies; legislative processes.

Ability to: Assist in development of public health and health care projects; apply health regulations, policies and procedures; participate in monitoring and evaluating health programs and projects; gather, analyze and organize data related to health programs; analyze administrative problems and recommend effective action; speak and write effectively; act as program liaison with staff in other programs at the Federal, State, and local level; assist in planning, conducting and evaluating of field projects; recommend and take actions on a variety of health programs, project activities, staffing and budgetary processes; analyze proposed legislation, regulations and health program standards; provide consultation and technical assistance to local agencies; serve on task forces and committees as a program representative.

**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 persons 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.

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This position is expected to travel throughout California to perform onsite surveys of health plans up to 20% of the time.

**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:**

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.)*

**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