



Duty Statement

Classification: **Research Data Analyst I**

Position Number: **275-550-5729-001**

HCM#: **5765**

Branch/Section: **Health Policy and Benefits Branch / Health Policy & Data Division / Health Care Information Analysis Section**

Location: **Sacramento, CA**

Working Title: **Data Analyst**

Effective Date: **June 23, 2026**

Collective Bargaining Identifier (CBID): **R01**

Supervision Exercised: **Yes** **No**

Telework: **Office-Centered** **Remote-Centered** **Not Eligible**

The California Public Employees' Retirement System (CalPERS) delivers health insurance to approximately 1.5 million members, with an annual expenditure of approximately \$11 billion. The Health Policy & Benefits Branch (HPBB) is responsible for overseeing both the CalPERS health benefits and long-term care programs, ensuring members receive equitable, high-quality, and affordable healthcare. HPBB is organized into four divisions, each reporting directly to the Chief Health Director. These divisions include the Health Policy & Data Division (HPDD), Health Account Management Division (HAMD), Health Plan Research & Administration Division (HPRA), and the Clinical Policy & Programs Division (CPPD). HPDD plays a key role in driving innovation, accountability, and continuous improvement by providing data insights and policy analysis.

Under the direct supervision of the Research Data Supervisor II, the Research Data Analyst I performs data analysis, research, reporting and data validation in the Health Policy & Data Division within the Health policy and Benefits Branch. The role supports the administration of the CalPERS Health Benefits Program by responding to information requests, analyzing health program data, resolving data issues, and preparing reports and presentations for internal and external stakeholders. The position works with health plan utilization, enrollment, premium, and provider data and coordinates with internal teams, vendors, and health plans to support data quality and operational decisions.

Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

- 40% Onsite¹ and virtually, conducts research and responds to information and data requests from internal team members, state and Public Agencies, the Legislative Analyst's Office, Department of Finance, health plan carriers, and CalPERS team members. Conducts ad hoc analyses of health program data and prepares reports, tables, and summaries for internal team members and external requestors. Utilizes the CalPERS data warehouse, Excel, Access, or related applications to query, extract, and calculate health program data in response to requests from CalPERS' team members or external entities. Data sources include health plan utilization, enrollment, and premium data stored in the CalPERS data warehouse.
- 25% Onsite and virtually, identifies, conducts research, and documents data anomalies, then coordinates with data suppliers, the data warehouse vendor, and internal team members through meetings, email, or telephone to recommend corrections and track issue resolutions. Conducts research and analyzes proposed solutions to determine whether manual data submission processes will achieve the intended outcomes. Participates in regular meetings with CalPERS team members, the data warehouse vendor, and assigned health plans to discuss data submission issues and support data integrity.
- 10% Onsite and virtually, coordinates with the Information Technology Services Branch (ITSB) and Just in Time (JIT) Unit to establish target ranges for extracting data files and reports used to fulfill health data requests. Analyzes and validates data files and reports to confirm accuracy, completeness, and consistency before distribution. Coordinates with the Information Security Office (ISOF) to review and validate data sets and to document data exchange processes that support compliance with applicable CalPERS, State, or Federal requirements.
- 10% Onsite and virtually, prepares reports and PowerPoint presentations summarizing research findings to HPDD leadership, the CalPERS Board of Administration, and external health care stakeholders.
- 10% Onsite and virtually, reviews enrollment reports and data requests with team members and provides feedback on data quality and adherence to CalPERS policies.
- 5% Onsite and virtually, performs other duties as assigned and appropriate for this classification.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- Various time-critical assignments are part of the typical workload.

Conduct, Attendance and Performance Expectations

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance).
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

Employee Name (Print):

Employee Signature: _____ **Date:**

I certify that the above accurately represent the duties of the position.

Supervisor Signature: _____ **Date:**