

Duty Statement

Department of Managed Health Care

OFFICE: Office of Administrative Services – Fiscal Services Division	EFFECTIVE DATE:
CLASSIFICATION: Supervisor II	DATE APPROVED: July 29, 2026
POSITION: 409-631-4801-XXX	TELEWORK DESIGNATION: Remote-Centered
WORKING TITLE: Assistant Chief Budget Officer	

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 Administrative Services (OAS) is responsible for providing all administrative support services to both internal and external DMHC customers, including human resources, labor relations, training, accounting, budgets, fiscal forecasting, facilities management, business services, contracts, procurement, organizational effectiveness and improvement, business continuity planning policies management, and strategic planning. These services support the health care delivery system by ensuring DMHC program units have the resources, services and tools required to fulfill their duties on a day-to-day basis.

GENERAL DESCRIPTION:

Under the general direction of the Chief Financial Officer (CFO), Manager II, of the (OAS), Fiscal Services Division (FSD), the Assistant Chief Budget Officer is responsible for the day-to-day management and oversight of the department's complex budgets functions. The incumbent plans, organizes and directs the activities of the Department's Budget Unit, providing leadership and guidance to staff responsible for budget development, analysis, monitoring and reporting.

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)

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| 30% (E) | Exercises full supervisory responsibility over subordinate supervisors and indirect supervision of budget analysts. Plans, organizes, assigns and monitors the workload of the unit to ensure timely completion of budget activities. Establishes performance expectations, evaluates employee performance, provides coaching and mentoring and promotes accountability, employee development and compliance with state laws and regulations. Fosters collaborative working relationships with internal programs, executive management and control agencies. Leads workforce development initiatives by identifying training needs, supporting employee growth, coordinating budget-related training and supports the development and maintenance of the department's learning management system to advance organizational professional development goals; and provide technical assistance during periods of high workload to ensure continuity of operations. |
| 30% (E) | Provides oversight of all departmental budgets activities and budget development processes. Leads the development, preparation, and submission of all Department of Finance (DOF)-required budget documents, including technical budget drills, Schedule 7A/8, Revenues/Transfers/Loans, Fund Condition Statements, Employee Compensation Adjustments, Indirect Cost Rate Proposal, and other budget-related reporting. Oversees and manages the development of the budget allotments for all DMHC programs; review, approve, and ensure accuracy of all technical analyses, workload justifications, projections, and fiscal documentation prepared by subordinate analysts; review personal services and operating expense projections; facilitating and overseeing internal Budget Change Proposals (BCP) and Spring Finance Letter processes, including leading budget-related trainings; manage appropriations and corrections; and oversee the Hyperion budget interface submissions while ensuring compliance with DOF requirements. |
| 25% (E) | Provides leadership and direction and presents fiscal policy and procedure recommendations to the CFO and Executive Office concerning budgets directives and instructions generated by the Department of General Services (DGS), California Department of Human Resources (CalHR), California Victim Compensation Board, Department of Finance (DOF) and Internal Revenue Service. Oversees internal controls for the Department including compliance with separation of duty requirements outlined in the State Administrative Manual (SAM), maintenance of system documentation and system modifications, and reviewing system operations to ensure adequate performance. Develops policies and procedures consistent with |

State guidelines to ensure proper controls are maintained for accountability of funds, and proper reporting requirements have been established to provide timely and accurate fiscal data.

10% (E) Oversees the development, maintenance and modification of the Department's financial management and budget system. Directs and performs the annual redistribution of personal services process which includes reconciliation of Personnel Office Position information and allocation of funding based on the individual characteristic of the positions.

5% (M) Plans and organizes fiscal activities to ensure budget functions are performed timely and accurately. Performs research and analysis on special projects as assigned and other related duties.

SUPERVISION EXERCISED OVER OTHERS:

Directly supervises subordinate supervisors and indirectly oversees clerical, technical, administrative, and professional staff.

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.

Have the ability to solve difficult personnel problems, research, understand, interpret and articulate applicable employment laws, rules and regulations.

Have knowledge and expertise with the operation and functions of the California Department of Human Resources (CalHR) and the State Personnel Board (SPB) and be knowledgeable of the California Government Code and the California Code of Regulations in the area of Human Resources.

Have knowledge and expertise with the principles and practices in public and business administration, including personnel management, classification and pay issues, labor relations, employee supervision, development and training, DMHC policies and procedures, safety, health and Equal Employment Opportunity objectives.

Have knowledge of the principles, practices, and trends of public and business administration, management, and supportive staff services; principles and practices of employee supervision, development, and training; program management; formal and informal aspects of the legislative process; the administration and department's goals and policies; governmental functions and organization at the state and local level; a supervisor/manager's responsibility for promoting

equal opportunity in hiring and employee development and promotion, and for maintaining a work environment which is free of discrimination and harassment.

Have the ability to reason logically and creatively utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; review and edit written reports, utilize interdisciplinary teams effectively in the conduct of studies; manage a complex departmental program; establish and maintain project priorities; develop and effectively utilize all available resources; and effectively promote equal opportunity in employment while maintaining a work environment that is free of discrimination and harassment.

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.

The employee is responsible for complying with the Information Practices Act (IPA) by protecting departmental employees' confidential information, including but not limited to social security numbers, medical or employment history, education, financial transactions or similar information. Failure to protect department employees' confidential information may damage DMHC's reputation as a confidential organization, may result in employee grievances or lawsuits, and, pursuant to California Civil Code section 1798.55, could result in disciplinary action, including termination of employment.

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:

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