DUTY STATEMENT

Classification: Research Data Specialist II	
Working Title: Senior Health Care Financing Data Specialist II	
Program: Health Care Financing	
Division: Provider Rates Division	
Section: Transportation and Technical Rates Section	
Branch: Outpatient Rates Branch	
Unit: N/A	
Office Location: 1501 Capitol Avenue, Sacramento, CA 95814	
COI Position: ☐ Yes ☑ No	Telework Eligible: ☑ Yes ☐ No
CBID: R01	Position Number: 805-780-5758-910
Bilingual Position: ☐ Yes ☑ No	Specify Language: Not Applicable

This position requires the incumbent to perform their essential functions; maintain consistent and regular attendance in-person and/or virtually; to communicate effectively and professionally, both orally and in writing; to develop and maintain knowledge and skills related to specific tasks, methodologies, materials, tools, and equipment; to complete assignments in a timely manner; and to adhere to departmental policies and procedures regarding attendance and conduct including those outlined in the Health Administrative Manual and the DHCS Telework Program. To promote collaboration and connection, essential functions are generally in-person consistent with the DHCS Telework Program and pursuant to an approved Telework Agreement.

Job Summary:

The Research Data Specialist II (RDS II) serves as a highly skilled Subject Matter Expert (SME) responsible for the development of the most complex Health Care Financing (HCF) program methodologies and their associated processes. The incumbent provides advanced statistical and analytical support using various technical software and tools. The incumbent will independently and pre-emptively identify programmatic issues within the incumbent's portfolio, conduct complex studies related to the program, and advise leadership on recommendations and alternatives. The incumbent will be required to design and coordinate complex research topics using a variety of developmental data collection tools for the production of deliverables for leadership review. The incumbent possesses technical knowledge as it relates to the development of data and financial modeling and performs the research and analysis on the highest level, most sensitive work within HCF.

The RDS II will be the main point of contact for consultation on major programmatic and data related issues related to HCF to leadership. When applicable, the RDS II will have the main function of generating innovative solutions to programmatic issues where bodies of knowledge or experience does not exist.

Job Summary (cont):

The duties contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. The incumbent of this position may perform other duties (commensurate with this classification) as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or to otherwise balance the workload.

Description of Duties:	
% of Time	**Essential Functions**
35%	Serves as SME on HCF program activities of the highest complexity for data analysis, data interpretation, and data modeling. Independently researches and provides recommendations for time sensitive ad-hoc requests of an extremely sensitive, complex nature. Develops various databasing and software tools used by other analysts to assist in the analysis of data and program development activities using organized structured and unstructured data (through Data Warehouses, SQL databases, and other data collection portals). Prepares concisely written materials and presents on highly complex programmatic issues and its associated solutions to leadership. On an ongoing basis, assesses the current data quality of HCF programs and makes recommendations for data quality standards and maintenance of historical data and reimbursement methodology to leadership. Under little direction, conducts research studies to identify the key drivers of historical, near-term, and long-term changes to HCF reimbursements and utilization. Analyze and report on differences among various services within the program to identify variations in delivery of services. Independently conducts and reviews the highest level, complex analyses and computations using advanced statistical methods, and expert judgment.
25%	Holds a lead role in designing, directing, and coordinating major complex research project activities that involve the development of data collection tools for purposes of implementing new HCF program policies and methodologies. Holds a lead role in developing and providing technical assistance and consultation on various data evaluation and statistic modeling techniques within SAS, Excel, and other statistical software. Performs data collection and validation, quantitative and qualitative data-driven research, financial modeling, data, and statistical analysis. Collaborates with other divisional SMEs, business partners, and other key stakeholders to triage the highest level programmatic HCF issues using advanced statistical methods and expert judgment. In a lead capacity, develops and utilizes research methodologies to draft fiscal impact documents, and proposed Medi-Cal Policy Changes. Serves as the project lead between DHCS divisions and branches, external department, stakeholders, SME work groups, and other external representatives. As the SME, serves as the lead facilitator during stakeholder meetings and workgroup work groups, providing a productive and structured environment to facilitate collaboration between competing stakeholder opinions and perspectives while achieving consensus and managing the scope of the project.

Description of Duties:	
% of Time	**Essential Functions**
20%	Identifies areas of opportunity within current reimbursement methodologies and data extraction processes. Develop databases and data models for efficient tracking and updating of Health Care Financing programs. Evaluates and verifies the accuracy, adequacy, and equivalence of proposed reimbursement rates. Reviews and analyzes pertinent cost and utilization data extracted from Management Information System/Decision Support System (MIS/DSS), and the Department of Health Care Access and Information (HCAI) Annual Financial Disclosure Reports. Pre-emptively researches other potential data sources that may be used for HCF programs. Independently compiles, analyzes and interprets fiscal and other relevant data to develop and maintain provider reimbursement and paid claims data to conduct complex and technical research and statistical data analyses to develop reimbursement models, and monitors methodologies and standards to comply with reimbursement policies and procedures.
15%	Acts as an advanced user and developer of existing HCF reimbursement methodologies and software used for data analysis, providing guidance to other analytical staff. Conduct complex ongoing data analytics and data quality monitoring and provide training and technical assistance to HCF program SMEs as data collection and reporting issues arise and/or are identified through monitoring and analysis efforts. Identifies additional resources for data collection purposes, data developmental tools, and reporting processes to streamline the data analysis process. Assists analysts on the technical component of developing State Plan Amendments relating to reimbursement methodologies; provides ad hoc research input for analysis of legislation; supports the development of Budget Change Proposals, Issue Papers, Provider Bulletin Articles, Operating Instruction Letters and other written deliverables.

Description of Duties	
% Of Time	**Essential Functions**
% Of Time	**Marginal Functions**
5%	Perform other duties as required.

Supervision Received: Under General Direction by the (enter supervisor classification):
Supervisor II.

Supervision Exercised: (check all that apply) ☑ Non-Supervisory Classification / None
☐ Clerical Staff ☐ Analytical Staff ☐ Technical Staff
☐ Professional Staff ☐ Supervisory Staff ☐ Managerial Staff

Special Requirements:
☐ Medical Evaluation /Clearance ☐ Typing Certificate ☐ Valid Driver's License
☐ Background Check / Finger Printing Clearance
☐ Valid Professional License (please specify): _____

Desirable Qualifications:

The incumbent should possess advanced level experience in Microsoft Suite, with particular focus on Microsoft Access, Excel, SAS, Python, SQL, Visual Studios and/or other types of statistical software to be successful in this position. A working knowledge of ArcGIS and PowerBI is highly desired. The RDS II is expected to utilize advanced deductive and inductive processes to research and develop time-sensitive data models in areas where precedents are lacking and/or a sparse body of knowledge or experience in the area exists. The RDS II will also be responsible for preparing custom reports and summaries for submission to executive management and the Centers for Medicare & Medicaid Services and will present on these issues to leadership.

Working Conditions (Check all that apply):
Prolonged Periods of:
☐ Standing ☑ Sitting ☐ Kneeling ☐ Bending
Travel May be Required:
☐ Occasional ☐ Over Night
Requires Lifting of Heavy Objects up to: _____

Acknowledgements:

Human Resources Acknowledgement: The Human Resources Division has reviewed and approved this duty statement.

Analyst Name:	Analyst Signature:	Date:
Merissa Schrezenmeier	Merissa Schrezenmeier Digitally signed by Merissa Schrezenmeier Date: 2026.08.24 13:56:39 -07'00'	

Employee Acknowledgement: I have discussed with my supervisor the duties of the position and have received a copy of this duty statement.

Employee Name:	Employee Signature:	Date:

Supervisor Acknowledgement: I certify this duty statement represents an accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.

Supervisor Name:	Supervisor Signature:	Date:

DUTY STATEMENT

Classification: Research Data Specialist II	
Working Title: Senior Health Care Financing Data Specialist II	
Program: Health Care Financing	
Division: Provider Rates Division	
Section: Transportation and Technical Rates Section	
Branch: Outpatient Rates Branch	
Unit: N/A	
Office Location: 1501 Capitol Avenue, Sacramento, CA 95814	
COI Position: ☐ Yes ☑ No	Telework Eligible: ☑ Yes ☐ No
CBID: R01	Position Number: 805-780-5758-911
Bilingual Position: ☐ Yes ☑ No	Specify Language: Not Applicable

This position requires the incumbent to perform their essential functions; maintain consistent and regular attendance in-person and/or virtually; to communicate effectively and professionally, both orally and in writing; to develop and maintain knowledge and skills related to specific tasks, methodologies, materials, tools, and equipment; to complete assignments in a timely manner; and to adhere to departmental policies and procedures regarding attendance and conduct including those outlined in the Health Administrative Manual and the DHCS Telework Program. To promote collaboration and connection, essential functions are generally in-person consistent with the DHCS Telework Program and pursuant to an approved Telework Agreement.

Job Summary:

The Research Data Specialist II (RDS II) serves as a highly skilled Subject Matter Expert (SME) responsible for the development of the most complex Health Care Financing (HCF) program methodologies and their associated processes. The incumbent provides advanced statistical and analytical support using various technical software and tools. The incumbent will independently and pre-emptively identify programmatic issues within the incumbent's portfolio, conduct complex studies related to the program, and advise leadership on recommendations and alternatives. The incumbent will be required to design and coordinate complex research topics using a variety of developmental data collection tools for the production of deliverables for leadership review. The incumbent possesses technical knowledge as it relates to the development of data and financial modeling and performs the research and analysis on the highest level, most sensitive work within HCF.

The RDS II will be the main point of contact for consultation on major programmatic and data related issues related to HCF to leadership. When applicable, the RDS II will have the main function of generating innovative solutions to programmatic issues where bodies of knowledge or experience does not exist.

Job Summary (cont):

The duties contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. The incumbent of this position may perform other duties (commensurate with this classification) as assigned, including work in other functional areas to cover during absences, to equalize peak work periods or to otherwise balance the workload.

Description of Duties:	
% of Time	**Essential Functions**
35%	Serves as SME on HCF program activities of the highest complexity for data analysis, data interpretation, and data modeling. Independently researches and provides recommendations for time sensitive ad-hoc requests of an extremely sensitive, complex nature. Develops various databasing and software tools used by other analysts to assist in the analysis of data and program development activities using organized structured and unstructured data (through Data Warehouses, SQL databases, and other data collection portals). Prepares concisely written materials and presents on highly complex programmatic issues and its associated solutions to leadership. On an ongoing basis, assesses the current data quality of HCF programs and makes recommendations for data quality standards and maintenance of historical data and reimbursement methodology to leadership. Under little direction, conducts research studies to identify the key drivers of historical, near-term, and long-term changes to HCF reimbursements and utilization. Analyze and report on differences among various services within the program to identify variations in delivery of services. Independently conducts and reviews the highest level, complex analyses and computations using advanced statistical methods, and expert judgment.
25%	Holds a lead role in designing, directing, and coordinating major complex research project activities that involve the development of data collection tools for purposes of implementing new HCF program policies and methodologies. Holds a lead role in developing and providing technical assistance and consultation on various data evaluation and statistic modeling techniques within SAS, Excel, and other statistical software. Performs data collection and validation, quantitative and qualitative data-driven research, financial modeling, data, and statistical analysis. Collaborates with other divisional SMEs, business partners, and other key stakeholders to triage the highest level programmatic HCF issues using advanced statistical methods and expert judgment. In a lead capacity, develops and utilizes research methodologies to draft fiscal impact documents, and proposed Medi-Cal Policy Changes. Serves as the project lead between DHCS divisions and branches, external department, stakeholders, SME work groups, and other external representatives. As the SME, serves as the lead facilitator during stakeholder meetings and workgroup work groups, providing a productive and structured environment to facilitate collaboration between competing stakeholder opinions and perspectives while achieving consensus and managing the scope of the project.

Description of Duties:	
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15%	Acts as an advanced user and developer of existing HCF reimbursement methodologies and software used for data analysis, providing guidance to other analytical staff. Conduct complex ongoing data analytics and data quality monitoring and provide training and technical assistance to HCF program SMEs as data collection and reporting issues arise and/or are identified through monitoring and analysis efforts. Identifies additional resources for data collection purposes, data developmental tools, and reporting processes to streamline the data analysis process. Assists analysts on the technical component of developing State Plan Amendments relating to reimbursement methodologies; provides ad hoc research input for analysis of legislation; supports the development of Budget Change Proposals, Issue Papers, Provider Bulletin Articles, Operating Instruction Letters and other written deliverables.

Description of Duties	
% Of Time	**Essential Functions**
% Of Time	**Marginal Functions**
5%	Perform other duties as required.

Supervision Received: Under General Direction by the (enter supervisor classification):
Supervisor II.

Supervision Exercised: (check all that apply) ☑ Non-Supervisory Classification / None
☐ Clerical Staff ☐ Analytical Staff ☐ Technical Staff
☐ Professional Staff ☐ Supervisory Staff ☐ Managerial Staff

Special Requirements:
☐ Medical Evaluation /Clearance ☐ Typing Certificate ☐ Valid Driver's License
☐ Background Check / Finger Printing Clearance
☐ Valid Professional License (please specify): _____

Desirable Qualifications:

The incumbent should possess advanced level experience in Microsoft Suite, with particular focus on Microsoft Access, Excel, SAS, Python, SQL, Visual Studios and/or other types of statistical software to be successful in this position. A working knowledge of ArcGIS and PowerBI is highly desired. The RDS II is expected to utilize advanced deductive and inductive processes to research and develop time-sensitive data models in areas where precedents are lacking and/or a sparse body of knowledge or experience in the area exists. The RDS II will also be responsible for preparing custom reports and summaries for submission to executive management and the Centers for Medicare & Medicaid Services and will present on these issues to leadership.

Working Conditions (Check all that apply):
Prolonged Periods of:
☐ Standing ☑ Sitting ☐ Kneeling ☐ Bending
Travel May be Required:
☐ Occasional ☐ Over Night
Requires Lifting of Heavy Objects up to: _____

Acknowledgements:

Human Resources Acknowledgement: The Human Resources Division has reviewed and approved this duty statement.

Analyst Name:	Analyst Signature:	Date:
Merissa Schrezenmeier	Merissa Schrezenmeier Digitally signed by Merissa Schrezenmeier Date: 2026.08.24 13:58:01 -07'00'	

Employee Acknowledgement: I have discussed with my supervisor the duties of the position and have received a copy of this duty statement.

Employee Name:	Employee Signature:	Date:

Supervisor Acknowledgement: I certify this duty statement represents an accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.

Supervisor Name:	Supervisor Signature:	Date:

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Branch: Outpatient Rates Branch	
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COI Position: ☐ Yes ☑ No	Telework Eligible: ☑ Yes ☐ No
CBID: R01	Position Number: 805-780-5758-920
Bilingual Position: ☐ Yes ☑ No	Specify Language: Not Applicable

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Supervision Received: Under General Direction by the (enter supervisor classification):
Supervisor II.

Supervision Exercised: (check all that apply) ☑ Non-Supervisory Classification / None
☐ Clerical Staff ☐ Analytical Staff ☐ Technical Staff
☐ Professional Staff ☐ Supervisory Staff ☐ Managerial Staff

Special Requirements:
☐ Medical Evaluation /Clearance ☐ Typing Certificate ☐ Valid Driver's License
☐ Background Check / Finger Printing Clearance
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Desirable Qualifications:

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Working Conditions (Check all that apply):
Prolonged Periods of:
☐ Standing ☑ Sitting ☐ Kneeling ☐ Bending
Travel May be Required:
☐ Occasional ☐ Over Night
Requires Lifting of Heavy Objects up to: _____

Acknowledgements:

Human Resources Acknowledgement: The Human Resources Division has reviewed and approved this duty statement.

Analyst Name:	Analyst Signature:	Date:
Merissa Schrezenmeier	Merissa Schrezenmeier Digitally signed by Merissa Schrezenmeier Date: 2026.10.07 13:25:56 -07'00'	

Employee Acknowledgement: I have discussed with my supervisor the duties of the position and have received a copy of this duty statement.

Employee Name:	Employee Signature:	Date:

Supervisor Acknowledgement: I certify this duty statement represents an accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.

Supervisor Name:	Supervisor Signature:	Date:

Instructions

A duty statement is a description of tasks, functions, and responsibilities of a position to which an employee is assigned, and the percent of time spent on each task. It is based on objective information obtained by thoroughly analyzing the position's functions, the competencies and skills required to accomplish these functions, and the organizational needs of the department.

Classification:	Enter the legal title documented in the Classification Specifications which contains a formalized summary of the duties and responsibilities of the positions in a class.
Working Title:	Enter a working title if there is one. The working title differs from a classification title, as it can be specific to the duties the classification is performing. e.g., Personnel Liaison, Contracts Analyst, etc.
Program / Division / Branch / Section / Unit:	Enter the information that is in alignment with where the position is located in the organization. This should also mirror what is presented on the organization chart.
Office Location:	The term office location refers to the state worksite that is the employee's reporting location when not teleworking.
Position Number:	Enter the agency, unit, class code, and serial number of the vacant position being filled. e.g., 808-202-5393-810.
Telework Eligible:	Check 'Yes' if this position is eligible for a telework schedule. Check 'No' if this position is not eligible for a telework schedule.
Conflict-of-Interest (COI) Classification:	Check 'Yes' if this position is designated under the COI Code. The position is responsible for making or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of appointment. Failure to comply with the COI Code requirements may void the appointment. Check 'No' if this position is not designated under the COI Code.
Collective Bargaining Identifier (CBID):	Enter the CBID. The CBID information can be found in the CalHR Pay Scale. Select option 15 for an alphabetical listing of Classifications. Find your classification. The CBID will be located in the last column on the right. For the CBID information, include the appropriate letter (M, S, C, R) and the unit number.
Bilingual Position:	Check 'Yes' if this position is bilingual certified. If 'Yes' is checked the language for which the position is bilingual certified must be specified in the next field. Check 'No' if this position is not bilingual certified.
Job Summary:	Include a brief description of the position, duties performed, reporting structure, and any pertinent information you feel is necessary.
Description of Duties:	Provide an itemized listing of the specific job duties and the percentage of time spent on each separate and distinct task. The essential and marginal functions should be identified. Group related tasks under the same percentage with the highest percentage first. Percentages must be listed in descending order and must equal 100%. **Essential Functions:** Assess whether the performance of a function is 'essential' by asking yourself why the position exists and what is it the employee is being hired to do. As you review each task, ask yourself whether it is a basic,

	necessary, and integral part of the job, which would make that task essential. Ask yourself, does the position exist solely to perform that function? Are there a limited number of employees available to perform that function? Is it a highly specialized function? If so, the task may be 'essential'. **Marginal Functions:** Marginal functions are incidental and only account for a minimal part of the job. They are secondary to essential functions, and they make up the remaining duties of the position. Keep in mind that marginal functions can also be absorbed by another staff member so if they were to be removed, it doesn't change the concept of the position.
Supervision Received:	Check the nature of the supervision received and enter the classification of the supervisor. Review the Classification Specifications and see the descriptions below to help determine the type of supervision this position receives. **Under Close Supervision:** Used for entry-level classes in which an employee is learning the duties of the class as a trainee or apprentice. **Under Supervision:** The position is subject to continuous and direct control. **Under General Supervision:** The position is subject to a minimum of continuous and direct control. **Under Direction:** Indicates that supervision is general and not close, continuous, or concerned with details. The statement tends to be used with technical and professional positions where the employees are expected to operate with a reasonable degree of independence, or as a journeyperson or fully qualified worker. **Under General Direction:** This usually refers to classes on the division level that receive administrative direction. The guidance is usually outlined in legislation and general rules of the organization. **Under Administrative Direction:** This is usually used only in classes involving top-level, administrative positions in which the guidance is largely that of overall policy and the requirements of legislation.
Supervision Exercised:	Check 'Yes' if this position exercises supervision. If 'Yes' is checked, select all classification types supervised by this position. Check 'No' if this position does not exercise supervision.
Special Requirements:	Enter any requirements that may be necessary per classification specification or specific department, i.e., background check, drug test, medical license, etc.
Desirable Qualifications:	Enter any knowledge, skills and abilities and other desirable qualifications, such as special personal characteristics, interpersonal skills, etc., not required as part of the minimum qualifications but represent additional attributes being sought after by the hiring manager.
Working Conditions:	Describes the working conditions of the job, i.e., physical demands, if the job is indoor/outdoor, if travel is required and how often, varying schedule, transportation information, etc.
Human Resources Acknowledgement:	Completed by Human Resources Division to indicate the last date of review.

Employee Acknowledgement:	Employee signs and dates the document certifying that the duties of the position were discussed with the supervisor and that a copy of the duty statement was received.
Supervisor Acknowledgement:	Supervisor signs and dates the document certifying that the duty statement represents an accurate description of the essential functions of the position, and that the duties of the position were discussed with the employee. Once signatures are obtained, make two copies, and place a copy in the supervisor's drop file and provide one to the employee. Send the original to Human Resources Division to file in the employee's Official Personnel File (OPF).