DUTY STATEMENT
DSH3002 (Rev. 01/2020)

California Department of State Hospitals

Box reserved for Personnel Section

	RPA #	C&P Analyst Approval	Date
Employee Name	**Division** Medical Services		
Position No / Agency-Unit-Class-Serial 502-340-5393-XXX	**Unit** Ancillary – Scheduler's Office		
Class Title Analyst II	**Location** Department of State Hospitals - Patton		

Subject to Conflict of Interest	CBID	Work Week Group:	Pay Differential	Other
☐Yes ☒No	R01	2		

Briefly (1 or 2 sentences) describe the position's organizational setting and major functions:
Under the supervision of the Supervisor I, the Analyst II will oversee all appointment referral processes, provide oversight to analyst I coordinators and clerical support, provide one-on-one guidance to referring physicians, take lead in the development of systems to improve and streamline referral processes, and provide summary reports for all databases as they pertain to medical services referrals, prior authorization guidelines, appointment timelines regulatory compliance, process improvements and over success rates.

Primary functions include carrying out varied, and complex technical analytical assignments such as prior authorization review, evaluation and processing for next action steps needed; planning; policy analysis and formulation; systems development; budgeting, planning, and fiscal analysis; research; reporting, tracking and record keeping; regulatory compliance and provide consultative services and administrative services to Medical Director, Chiefs, Supervisors, Physicians and Clinical Staff, in efforts to ensure alignment with CHP Prior Authorization standards, HIPAA regulations, and reporting requirements for agencies, stakeholders and committee members.

% of time performing duties	**Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first; percentage must total 100%. (Use additional sheet if necessary).**

50%	**Prior Authorization Core Responsibilities** • ***Review all incoming referrals and associated documentation following the Prior Authorization Referral Guidelines to ensure all required fields are entered thoroughly, legibly, and with all required supporting documentation: patient identification, referring physician details, specialty being requested with specific action requested, urgency, referral reasoning, relevant clinical details for referral, summary of prior workup, supporting documents and patient involvement.*** • **Applies knowledge of basic medical terminology (prefixes, word roots and suffixes) to determine appropriate necessities for complete referral submittals** • **Maintains tracks, reports, and gathers necessary documentation for the completion of prior authorization submittals prior to delegation for entry into the CHP Prior Authorization portal; tracks related data and maintains records to ensure all referral and appointment processes are moving steadily without delay.** • **Clinical Data Analysis: Evaluate healthcare data, clinical processes, reviewing patient outcomes, prior authorization approval rates, and populated health data using EHR (Electronic Health Record) systems.** • **Regulatory Compliance: Ensuring alignment with CHP Prior Authorization standards, HIPAA regulations, and reporting requirements for agencies, stakeholders and committee members.** • **Process Improvement: Designing reports, dashboards, and root-cause evaluations to optimize patient care and revenue cycle management.** **Medical Appointments Overview & Responsibilities** • **Data Interpretation: Collects, sorts, and analyzes complex healthcare datasets, including medical/pharmacy claims, electronic medical records (EMR/EHR), and utilization management data.** • **Clinical Insights: Conducts root-cause analyses on patient populations, tracks health outcomes, and evaluates operational or clinical performance metrics.** • **Collaboration: Works closely with clinical leadership, administrative teams, and supporting clerical staff to translate clinical workflows into actionable data insights** •
25%	**<u>Data Analysis, Tracking, and Reporting</u>** • Collect, reconcile, and analyze referral, letter of agreement, authorization, and appointment data. • Monitor submission dates, pending decisions, requests for additional information, approval and denial trends, partial approvals, authorization expiration dates, and appointment timelines.

	• Prepare periodic summaries and recommendations for Medical Services Management; identifying recurring causes of incomplete submissions and delays. • Maintain tracking records that support accurate reporting. • Track requests for additional information, denial letters, and appeal deadlines. • Promptly route clinical questions and denial decisions to the Chief Physician and Surgeon and/or the Chief of Primary Care. • Coordinate administrative correction or extension requests with CHP and document the status of each issue. • Evaluate handoffs among physicians, clinic coordinators, CHP, and outside providers. • Recommend to Medical Services Management practical changes to improve submission completeness, status visibility, and coordination of approved follow-up services. • Develops systems for tracking and monitoring prior authorization and appointment time frames • Frequent consultation with CHP, PSH Leadership and Medical Staff to address areas of concern or that need improvement. • Performs research as needed to ensure the statement of work meets the requirements of each specific service including technical requirements, completion dates, benchmarks, timelines, and quantitative and qualitative budget analysis. • Prepares submittal documents and obtains approval for services for delegation to the scheduling coordinators. • Reviews and analyzes guidelines and requirements per Milliman Care Guidelines (MCG) to maintain compliance with all regulatory and legislative policies and procedures. • Research and analyzes referring physician has met compliance with medical specialty referral needs and treatment protocols. • Make recommendations for improving and standardizing guides for future submittals.
10%	<u>GENERAL OFFICE DUTIES AS THEY RELATE TO MEDICAL SERVICES AND CLINICAL OPERATIONS</u> • **Provides back-up support to maintain continuity of operations in the appointment coordinator's offices, including but not limited to the duties of the Analyst I's and Office Technicians.** • Offers support for Data Entry, pulling clinics reports and reaching out to outside provides to follow up on delinquent clinic reports • Generates additional reporting, and offers data tracking back up support.

	• Assist Medical Services Supervisor I with the tracking and follow up of Letters of Agreements, Letters of Authorizations and other critical needs for establishing continuity of care • Provides customer service/receptionist/general office support by answering phones and assisting walk-ins. • Provides personnel analysis, coordinates training or tutorials for staff related to appointment requests, coordination and completion • Prepare, organize, and lead training or meeting presentations. • Performs other duties as assigned.
15%	**<u>INTERPERSONAL RELATIONSHIPS</u>** • **Maintains a positive rapport with hospital staff, employees, other outside agencies, and the public in written and verbal correspondence.** • **Utilizes a high degree of initiative, judgment, and responsibility when dealing with all staff and the public.** • **Takes initiative to communicate professionally and effectively with supervisors, managers, staff, patients, contractors, outside agencies and other stakeholders to ensure smooth workflow and proper documentation when needed and follows through on problem resolutions; and delivers effective oral presentations.** • Promotes and maintains a teamwork relationship with staff, thereby enhancing work productivity. **<u>LEADERSHIP DEVELOPMENT</u>** • **Takes an active role in quality improvement processes by providing critiques and identifying deficiencies and areas for improvement; and integrates lessons learned into documents and procedures.** • Serves on ad hoc and task force committees at the hospital and/or department level. Works closely with the Medical Services Management Team to develop and monitor current and future needs of the hospital, as they relate to medical services available, sought and overall management. • Uses Policy and Procedures manuals and other reference materials as necessary to ensure proper course of action and accuracy of documents. • Interprets and communicates department policies and procedures to hospital staff, outside agencies, and public members.

	• Provide one-on-one guidance to referring physicians on documentation and routing requirements. • Train and guide Staff Service Analysts, Office Technicians, and Medical Services staff on consistent process steps. • Review work for quality and timeliness and report training or workflow concerns to the Supervisor I. • May serve as lead person for Staff Service Analyst, Office Technician, and Student Assistant.
Required Competencies	**SUPERVISION RECEIVED:** Under the supervision of the Supervisor I. **SUPERVISION EXERCISED:** None. As assigned, may act as a lead person for Analyst I, Office Assistants, Office Technicians, Student Assistants, Limited Duty or Temporary Personnel. **ABILITY TO:** Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and administrative problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work. **KNOWLEDGE OF:** • **Medical Knowledge:** Familiarity with basic medical terminology (prefixes, word roots and suffixes), identifying specialty referrals, HIPAA compliance, and coding systems such as ICD-10 (diagnoses/procedures) and CPT (services). • Analytical methods, procedure development, data quality, effective communication, and lead work practices. • Ability to analyze complex process and performance data, develop and evaluate alternatives, write clear procedures and reports, coordinate work across clinical and administrative teams, explain requirements to staff and physicians • Principles, practices, and trends of public and business administration, and supportive administrative services such as budgeting, fiscal analysis and accounting. • Data analysis; recordkeeping, creating and maintaining spreadsheets and ledgers and governmental functions and organization. • **Computer literacy** in Microsoft Word, Excel, PowerPoint, Teams and other platforms as needed for chat, meetings, calling, and file sharing; Exchange (Outlook), Adobe/Acrobat, Internet, Intranet, WarmSS,

CIS, SharePoint
- Apply principles and practices of public personnel management.
- Research and apply rules, laws, standards and procedures in contracting, procurement and fiscal issues.

TECHNICAL PROFICIENCY (SITE SPECIFIC)
This position utilizes various office equipment and computers; must have a working knowledge and be able to operate calculators, computers, printers, copiers, telephones, projectors, telepresence, remote control devices, and fax machines.; must possess proficiency with computer keyboarding and applications as captured above. Skillset to develop spreadsheets, graphs, and presentations. Highly organized and knowledgeable for electronic and physical filing systems.

ANNUAL HEALTH REVIEW: All employees are required to have an annual health review and TB test or whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and can safely perform their essential job functions.

INFECTION CONTROL: Applies knowledge of correct methods of controlling the spread of pathogens appropriate to job class and assignment.

HEALTH AND SAFETY: Activity supports a safe and hazard free workplace through practice of personal safety and vigilance in the identification of safe or security hazards.

THERAPEUTIC STRATEGY INTERVENTION (TSI): Supports safe working environment; practices the strategies and interventions that promote a therapeutic milieu; applies and demonstrates knowledge of correct methods in the management of assaultive behavior in accordance with policy.

CULTURAL AWARENESS: Demonstrates awareness to multicultural issues in the workplace that enable the employee to work more effectively.

RELATIONSHIP SECURITY: Demonstrates professional interactions with patients and maintains therapeutic boundaries. Maintains relationship security in the work area; takes effective action and monitors, per policy, any suspected employee/patient boundary violations.

SITE SPECIFIC COMPETENCIES
Ability to maintain confidentiality, professionalism, professional attire and conduct; able to present a positive, professional, cordial, courteous, & polite attitude as a front-line representative for the department; to demonstrate excellent verbal and written communication skills and organizational skills; to provide clear and concise information to callers, hospital staff, committee members and medical staff; to prepare, organize, and lead training presentations; to maintain records, ledgers, reports, and manuals; to maintain proper filing practices; to develop plans, specifications, proposals; to interpret

	MCG Guidelines as it refers to evidenced based clinical criteria to develop plans, specifications, proposals for remediation; follow oral and written instructions, take initiative and work independently, stay disciplined, attend to details, adhere to deadlines, manage time based on priorities, reason logically and creatively, apply a variety of analytical techniques to resolve issues and develop alternatives, and be tactful and resourceful during difficult situations; and **physical ability to sit for extended periods, ability to walk/stand as needed for onsite guidance requested by medical services staff, continued use of keyboarding and computer mouse for frequent and extended periods, and apply fine hand motor movements as required for holding writing instruments, use of staplers, use of keyboard, and clicking/pushing buttons**.
License or Certification	None
Training	The employee is required to keep current with the completion of all required training.
Other Information	Regular and consistent attendance is critical to the successful performance of this position due to the heavy workload and time-sensitive nature of the work. The incumbent routinely works with and is exposed to sensitive and confidential issues and/or materials and is expected to maintain confidentiality at all times. The Department of State Hospitals provides support services to facilities operated within the Department. A required function of this position is to consistently provide exceptional customer service to internal and external customers. The employee is required to work any shift and schedule in a variety of settings and security areas throughout the hospital and may be required to work overtime and float to other work locations as determined by the operational needs of the hospital. All employees are required to have an annual health review and repeat health reviews whenever necessary to ascertain that they are free from symptoms indicating the presence of infection and are able to safely perform their essential job functions. I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the Office of Human Rights). _____ _____ _____ Classification (Employee Signature) Print Name Date

	I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above. _____ _____ _____ Classification (Supervisor Signature) Print Name Date _____ _____ _____ Classification Reviewing Supervisor Signature Print Name Date