Duty Statement

Classification: **Research Data Analyst I**

Position Number: **275-173-5729-001**

HCM#: **1765**

Branch/Section: **Health Policy & Benefits Branch / Health Plan Research & Administration Division / Health Plan Financial Services / Health Plan Funded Services Section / HMO Funded Services Unit**

Location: **Sacramento, CA**

Working Title: **HMO Financial Data Analyst**

Effective Date: **November 10, 2026**

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

Supervision Exercised: ☐ **Yes** ☒ **No**

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

The Health Plan Research & Administration Division (HPRA) is responsible for contract leadership oversight partnering with the Third-Party Administrators of the Self-Funded Preferred Provider Organization (PPO) plans, the Partially Self-Funded Health Maintenance Organization (HMO) plans, the Pharmacy Benefit Manager (PBM), and the Association plans to provide health plan coverage options to CalPERS active and retired members. In addition, HPRA partners with the Health Policy and Research Division (HPRD) in the negotiation of annual health premiums. As part of that effort, HPRA leads negotiations related to administrative services fees, clinical fees, performance guarantees and pay-for-performance incentives. CalPERS Health plans provide medical and pharmacy benefits to approximately 1.5 million members. Health Plan Funded Services provides support for development, leadership, and reconciliation of financial systems and data that assist in improving financial operational efficiency and cost-effectiveness.

Under direct supervision of the Supervisor I, HMO Funded Services Unit, the Research Data Analyst I (RDA I) provides analytical and technical support for HMO contractor compensation, financial reporting, reconciliation, and audit activities by performing entry-level analytical tasks using established procedures within the Health Plan Research & Administration Division. The incumbent assists with reviewing, validating, reconciling, and reporting financial data to support contract management and financial operations. Using established methods and procedures, the incumbent prepares reports, researches discrepancies, and works with contractors and internal staff to support accurate processing of financial deliverables.

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% Onsite[1] and virtually, under the guidance of senior staff, performs assigned financial data review tasks for HMO contractor compensation by applying established procedures to validate and reconcile required deliverables. Assists with analyzing HMO contractor financial data using Microsoft Excel, Microsoft Access, and related data tools to review, validate, reconcile, and process contractual financial submissions, including Administrative Services Fees, Fee-for-Service claims, Capitation Services Payments, Direct Pay Premiums, Pharmacy Rebates, Medicare Payments, and other contractual financial deliverables. Prepares reports, spreadsheets, and data summaries to identify trends, discrepancies, payment information, and financial activity for leadership review. Applies established techniques to organize, validate, summarize, and maintain financial data. Uses myCalPERS and related internal systems to research and validate membership enrollment information for reconciliation tasks. Assists with researching and identifying data discrepancies and coordinates with HMO Contractors to obtain supporting documentation, resolve data questions, and processes financial deliverables.

25% Onsite and virtually, assists with special projects related to HMO financial processes, contractor reporting requirements, and system enhancements by gathering data, organizing materials, and preparing summaries for leadership. Supports health plan contract solicitation, renewal, and implementation activities by gathering, organizing, and analyzing financial information and preparing supporting documentation for leadership review. Assists with checking financial contract language, exhibits, and reporting requirements for accuracy and completeness and identifies items for leadership review. Compiles financial data and supporting documentation for audit requests and assists with drafting responses to audit inquiries for leadership review. Organizes and formats financial and operational data using established templates for audit requirements, leadership requests, and program operations.

25% Onsite and virtually, assists with HMO financial reconciliation activities, including premium remittance, invoicing, and payment validation. Reviews and validates financial submissions from HMO Contractors to confirm required documentation is provided and information matches source records. Assists with researching and processing Direct Pay premium refund requests and related financial adjustments. Maintains and updates internal and external process documentation to support consistent procedures. Participates in meetings, training sessions, and workshops related to Health Plan Funded Services to learn current procedures and support unit operations.

5% Onsite and virtually, assists with researching Medicare Secondary Payer debt offset inquiries and related program requests. Compiles supporting documentation, conducts research applicable procedures and requirements, and prepares summaries for review by leadership. Maintains reference materials and documentation to support unit operations.

5% Onsite and virtually, supports the HMO Funded Services Unit with assigned tasks as directed by the team leader. 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.

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**: