DUTY STATEMENT

Classification: Research Data Specialist II	
Working Title:	
Program: Audits & Investigations	
Division: Investigation Division	
Branch: Provider Investigations Branch	
Section: Multi-Disciplinary North	
Unit:	
Office Location: 1700 K Street, Sacramento, CA 95814	
COI Position: ☑ Yes ☐ No	Telework Eligible: ☑ Yes ☐ No
CBID: R01	Position Number: 806-405-5758-001
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 departmental expert in medical data analysis, numerical analysis, research techniques, and research innovation within the Multi-Disciplinary North Section. The incumbent plans, organizes, and conducts complex studies in a variety of areas that affect programs or systems development within the State (requiring knowledge of Audits and Investigations and complex numerical approaches). The incumbent provides expert consultative services on the feasibility, impact, or potential of a variety of State operations, projects, or proposals to interested parties. In addition to the aforementioned, the incumbent is to advise management, departmental staff, legislative bodies, governmental entities, commissions, and agencies on findings related to their area of research. Incumbent serves as a key research expert supporting Audits and Investigations with data-driven insights related to Medi-Cal program integrity.

Under the general direction of the Health Program Audit Manager II, the RDS II will conduct advance level research using complex data-extraction tools and sophisticated analytical techniques (including but not limited to techniques such as dimensionality reduction, outlier identification regression methods specifically relating to the Medi-Cal program and the services that it administers, supervised and unsupervised machine learning techniques, etcetera). The RDS II will have to effectively communicate the research findings in both written and oral presentation formats. The RDS II will be the on-site expert to assist other staff members with the use of Excel, Access, Statistical Analysis System (SAS) Statistical Package for the Social Sciences (SPSS), Business Objects, Python, ArcGIS, and the Management Information System/Decision Support Systems (MIS/DSS).

Job Summary (cont):

Extensive knowledge of statistics, machine learning, and the various Medi-Cal programs are essential. Working knowledge of the Medicare and Medi-Cal program is desired.

Under general direction, incumbents independently perform the more complex data analysis in response to ad-hoc research and reporting requests utilizing business intelligence software programs to query, validate, format, and organize structured and unstructured data to forecast trends and assess potential impact in areas where changes are being implemented and a body of knowledge or experience does not exist. Incumbents have responsibility for coordinating the more complex research projects or activities, which involves defining and creating new data models and visualizations to ensure information needs are met. Senior departmental management utilizes these highly skilled practitioners as prime resource persons and innovators in the subject matter of their occupation. Incumbents have responsibility for designing and directing major complex research projects or activities. The Research Program Data Specialist II (RDS II) serves as a high- level medical data analyst and researcher. The incumbent will independently lead special projects as required by the management.

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**
45%	Conduct advanced level research using complex data-extraction tools and sophisticated analytical techniques (including but not limited to dimensionality reduction, and outlier identification regression methods specifically relating to the Medi-Cal program and services administered. Provide consultative services to DHCS management through research findings determined through advanced analytics and/or operational activities. Conduct projects including subject matter pertaining to on- going Branch and Division wide operational activities that ensure the fiscal integrity of the health programs administered by DHCS. Collaborate with necessary A&I branches and individuals outside the Division to accomplish vertically aligned organizational goals and objectives. Identify, recommend, and work with necessary parties to implement research-based refinements to operational approaches and methodologies pertaining to the realization of these value added activities.
25%	Perform as a research leader with other Research Data Specialists, Research Data Analysts, Pharmaceutical Consultants, Nurses, Medical Consultants, Managers, Dental Program Consultants and Auditors to ·provide research support to A&I. Participates in computer systems testing for the implementation of computer system modifications. Trains A&I staff to understand statistical concepts; the use of the provider case tracking system; use of alternative computer software provisioned by the Department; operational improvement of approaches and methodologies within the Division.
15%	Conduct mathematical and statistical research on the more complex claims payment issues, develop appropriate statistical models for audits; measures central tendencies and other measures of relationships (identified in audit results) using correlation coefficients such as Pearson's Product Moment Coefficient or Spearman's Rank Order Coefficient; calculates standard deviation and variances; and determines statistical significance using Analysis of Variance (ANOVA), t-Test, or Mann-Whitney u-Test; calculates confidence levels. Analyzes information, prepares and presents technical reports including recommendations for action. Implement recommendations and provide technical testimony supporting statistical methodologies when appropriate. Identify and develop methodological approaches for statewide evaluations of the health programs administered by DHCS.
10%	Reviews proposed Medi-Cal laws and regulations; advises management on matters related to the statistical Sampling Modules of the Advanced Surveillance and Utilization and Review Subsystem; and performs other duties as required. Conducts research on the more complex appealed recovery cases, prepares position papers and presents findings a technical subject matter expert before Administrative Hearings and in Superior Court civil proceedings regarding application of statistical methods for audit demands and recovery.

Description of Duties:	
% of Time	**Essential Functions**

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

Supervision Received: Under General Direction by the (enter supervisor classification):
Health Program Audit Manager 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:

Translate legislatively mandated program evaluation requirements into methodically rigorous study designs; translate departmental policy into action programs and/or test the impact of policy changes; evaluate the adequacy and merit of proposed research and evaluation study designs and techniques; provide expert consultation on the feasibility impact or potential of a variety of operations, projects or proposals to the department and to other organizations; analyze and evaluate the impact of changes to existing programs, procedures, business processes, and/or policies; use creativity when independently designing research projects; and write clear and concise studies and reports; design and develop research methodologies required to ensure the collection and analysis of appropriate, meaningful, and unbiased data; conduct and interpret descriptive and/or inferential statistical analyses using appropriate software to test research hypotheses and to formulate conclusions and recommendations; analyze situations accurately and take effective action at the appropriate time; and provide mentoring to staff.

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:
Mari Rodriguez		07/18/2026

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).