

Department of Consumer Affairs

Position Duty Statement

HR-041 (new 2/07)

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| Classification Title | Board/Bureau/Division |
| Staff Services Analyst | Medical Board of California |
| Working Title | Office/Unit/Section / Geographic Location |
| | Licensing Cashiering – Sacramento |
| Position Number | Effective Date |
| 629-160-5157-020 | |

Under the supervision of the Licensing Program Manager, Staff Services Manager I, the Staff Services Analyst (SSA) functions as the lead analyst, who performs functions and responsibilities in support of the Board's Cashiering Unit, comprised of one Office Technician (Typing) position, and one Account Clerk II. The SSA performs a wide variety of consultative assignments and complex analytical duties relative to program evaluation, planning, systems development and training. The SSA serves as the subject matter expert for the Board staff, management, public, and licensees regarding cashiering business processes and system issues. The incumbent trains, guides, and leads the unit towards accomplishing its work goals and objective; ensures cashiering functions are accurately reconciled; summarizes and provides statistical data.

A. SPECIFIC ASSIGNMENTS [Essential (E) / Marginal (M) Functions]

40% PROGRAM EVALUATION AND PLANNING (E)

- Identifies issues pertaining to the work flow of the unit, responds to any internal or external concerns, develops alternatives and solutions to address these issues, and presents them to Licensing management with an implementation plan. Apprises Licensing management of any cashiering backlogs, as well as identifying, developing, and implementing necessary changes to cashiering business process and policies and procedures to ensure best practices are being performed. Monitors the inflow of monies received, evaluates and assign workloads to the Office Technician and the Account Clerk II to ensure the timely accounting and deposit of all monies received by the Board. Acts as lead and provides training and reviews complex, technical or sensitive issues for cashiering staff. Serves as the point of contact for Board management and Executive staff independently researching, analyzing and making recommendations on complex, sensitive cashiering issues. **(20%)**
- Reconciles and approves the monies deposited in general checking account or the Revolving Fund checking account each day. Ensures deposits are timely and in compliance with State mandates mitigating potential loss of earned interest. Audits, reconciles and approves the Report of Collection ensuring the monies are recorded appropriately for quarterly and annual financial reports. Independently identifies, analyzes and resolves monetary discrepancies on a daily basis to safeguard state assets. **(10%)**
- Researches and responds to Public Record Act requests using sound judgment to interpret and apply California Government Code sections, Business and

Professions Code sections and departmental policy. Respond to other internal and external requests for documentation pertaining to cashiering functions. **(5%)**

- Evaluates and suggests changes to improve the effectiveness and efficiency of cashiering business processes. **(5%)**

25% CASHIERING RECONCILIATION AND STATISTICS (E)

- Analyzes reports indicating payments are in Suspense in BreEZe, researches issues, and updates records both in BreEZe as well as corresponds with DCA's Cashiering Unit, identifying where problems are systemic in nature and ensuring statistical databases maintained outside of BreEZe are updated appropriately. **(10%)**
- Consults with Licensing management on the development of systems and business processes to ensure adequate cash controls are in place that comply with state laws and regulations. Identifies activities which indicate performance deficiencies and provides recommendations on methods to correct inefficiencies and implement improvements, ensuring compliance with state guidelines and established internal controls. Ensures Licensing management is apprised of any monetary discrepancies. **(5%)**
- Compiles, analyzes, and creates statistical reports to distribute costs related to departmental shared services. **(5%)**
- Researches overpayments, determines validity and prepares the documentation for refunding overpaid fees, renewals and dishonored checks to ensure correct and timely handling. **(5%)**

25% BREEZE SYSTEM ANALYSIS (E)

- Functions as a high level licensing and cashiering subject matter expert and serves as project lead to research, analyze and resolve system issues. Evaluates procedures by which data is entered into BreEZe; identifies procedural gaps and internal concerns related to the BreEZe system; proposes and oversees the implementation of work-around processes to ensure completion of duties until issues are resolved; provides training and documentation to staff regarding workarounds; develops and maintains workplan for system issues and requests changes through BreEZe team members; consults with BreEZe team members and management to develop remedies and alternatives to ultimately resolve issues. Monitors and evaluates BreEZe during system design, development and implementation (DD&I) to ensure regression issues have not occurred during system releases. Provides regular reports to Licensing management as well as BreEZe team members on outstanding DD&I issues. Identifies operational risks related to BreEZe, consults with Licensing management and provides recommendations on methods and approaches to correct inefficiencies. **(10%)**
- Serves as the Board's Subject Matter Expert for BreEZe cashiering and represents the Board at various meetings and events related to BreEZe cashiering to ensure Board concerns are addressed. Consults with and provides support to internal stakeholders and executive management on BreEZe issues. **(5%)**
- Interprets, summarizes, and applies changes to rules and regulations pertaining to cashiering. Identifies forthcoming system and business process changes. Develops the procedures to be implemented to ensure compliance with business process changes which include fee changes, updates to the BreEZe system and online usage, as well as ensures all forms related to renewal of licenses and registrations are updated and printed correctly. Consults with DCA cashiering, executive management and the Department's legal counsel to implement changes

to fee codes. Collaborates with BreEZe team members to identify system requirements on code changes. Analyzes existing rules, regulations and policies to develop procedural changes and changes to forms to ensure licensing staff, applicants, and renewing licentiates are informed of any changes accordingly. **(5%)**

- Works with BreEZe team members and management to develop business processes to streamline and ensure accuracy of the BreEZe cashiering system. Makes recommendations for system enhancements to the internal as well as external BreEZe system providing documentation and supporting evidence of the need for enhancements. Identifies needed statistical reports and works with the Board's Information Systems Branch as well as BreEZe team members to identify system requirements; establish reporting parameters; and create, test and validate reports. **(5%)**

10% TRAINING, POLICY AND PROCEDURES (E)

- Provides training to new Cashiering staff on cashiering procedures and systems. Independently composes and maintains and/or edits policies and procedures for MBC cashiering staff to insure compliance with Business and Professions Code, legislation, regulations, and the State Administrative Manual (SAM) as it relates to the handling of monies. As the lead analyst in Cashiering, evaluates workload and reviews Cashiering staffs quality of work. Identifies job-related or job-required training for cashiers to increase their skills, knowledge, abilities and options for upward mobility. **(10%)**

B. Supervision Received

The Analyst works under the supervision of the Licensing Manager (SSM I).

C. Supervision Exercised

None

D. Administrative Responsibility

None

E. Personal Contacts

The incumbent has direct, frequent contact with Board staff and management, MBC executive staff, representatives from DCA cashiering and BreEZe team members, licensees and their representatives, and the general public.

F. Actions and Consequences

Failure to perform duties adequately could result in the Board not managing funds timely, accurately, and in compliance with laws, regulations, and the SAM manual. Additionally, failure could result in BreEZe issues not being addressed which could encumber cashiering business processes and delay the issuance and renewal of licenses which in turn impacts access to quality healthcare for California healthcare consumers.

G. Functional Requirements

No specific physical requirements are required. The incumbent works 40 hours per week in an office setting, with artificial light and temperature control. Daily access to and use of a personal computer and telephone is essential. Sitting and standing requirements are consistent with office work. Travel may be required to attend offsite meetings related to cashiering functions.

H. Other Information

Incumbent must possess good communication skills, use good judgment in decision-making, exercise creativity and flexibility in problem identification and resolution, manage time and resources effectively, and be responsive to MBC Staff, licensees, and consumers.

The analyst may be privy to sensitive and confidential issues and/or materials and is expected to maintain the privacy and confidentiality of documents and topics pertaining to individuals or to sensitive program matters at all times.

Title 11, section 703D California Code of Regulations requires criminal record checks of all personnel who have access to Criminal Offender Record Information (CORI). Pursuant to this requirement, applicants for this position will be required to submit fingerprints to the Department of Justice and be cleared before hiring.

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 hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety analyst.)

Employee Signature

Date

Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Printed Name

Revised: TK 10/2014

Approved: JM 1/2015