

**Proposed
Department of Health Care Access and Information
Duty Statement**

Employee Name Vacant	Organization Office of Administrative Services Budget Services Section	
Position Number 441-162-4800-XXX	Location Sacramento	Telework Option Hybrid
Classification Staff Services Manager I (Specialist)	Working Title Budget Projects Manager	

General Description	
<p>Under general direction provided of the Staff Services Manager II (SSM II), and in collaboration with multiple Budget Analysts and one Staff Services Manager (Spec), the Staff Services Manager I (Specialist) in the Budget Services Section acts as the Budget office's special project's manager.</p> <p>The Staff Services Manager I (Specialist) functions as the Budget Services Section special projects manager and independently performs fiscal analysis and fiscal management activities for the Department that requires a high level of knowledge and expertise vital to the successful implementation of mandated programs or activities. Duties include, but are not limited to, the following: The SSM I (Spec) develops and maintains spreadsheets and utilizes Microsoft Office suite software and the Financial Information System for California (FI\$Cal).</p> <p>This position is responsible for tracking the assigned requests, following up with programs regarding their responses, and working with the Director's office to schedule meetings when required to facilitate response coordination. This position will develop, and maintain the tracking process, and the SharePoint page, or other appropriate software, to be used as the database for information to be accessed for future reference, and verified for completeness. Incumbent track requests to meet priority deadlines assigned by the Legislative Analyst's Office, Department of Finance, and others who contact the Budget office seeking information on confidential and/or sensitive information. Responds to ad hoc requests for budget-related information from the Department of Finance, and independently represents the Budget Office in response to these inquiries. Overtime may be required from August through October and occasionally at other times of the year.</p>	
Supervision Received	Under supervision, incumbent reports directly to the SSM II in the Budget Services Section.
Supervision Exercised	None.
Physical Demands	Must possess and maintain sufficient strength, agility, endurance, and sensory ability to perform the duties contained in this duty statement with or without reasonable accommodation. The incumbent must be able to function effectively under stressful conditions.
Typical Working Conditions	Requires prolonged sitting and use of telephone and video data terminals and frequent contact with employees and the public. Requires mobility to various areas of the department work areas and may require travel to the department's Los Angeles office. Core business hours are 8:00 a.m. to 5:00 p.m. and extra hours may be necessary beyond scheduled work hours.
Job Duties	

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E = Essential, M = Marginal

30%	E	<p>Budget Change Proposal Lead Prepares and develops or assists program staff with developing Budget Change Proposals (BCPs), Finance Letters and May Revise requests to conform to statewide or departmental policies and program objectives. Ensure Budget Change Proposals (BCPs) comply with state policies, and departmental directions and agency directions, by reviewing and editing narrative descriptions and providing fiscal details and analysis. Reviews and edits narrative descriptions, workload justifications, cost estimates, expenditure projections, and related fiscal documents. Coordinates and negotiates necessary changes with departmental managers to ensure well written narrative and fiscal/workload analyses support the proposal. Prepares and reconciles various budget support documents which include planning estimate adjustment worksheets, position and equipment schedules, fiscal summaries, reports, concept papers, issue papers, cost analysis, and other financial reports. Provides guidance to program managers on budget development and BCPs. Ensure approved BCPs are entered into the correct Hyperion point of view. Maintain BCP records and tracking sheet.</p>
30%	E	<p>Budget Information Request and Budget Hearing Tracker Incumbent tracks requests to meet priority deadlines assigned by the Legislative Analyst's Office, Department of Finance, and others who contact the Budget office seeking information on confidential and/or sensitive information. This position is responsible for tracking the assigned requests, following up with programs regarding their responses. Incumbent will be responsible for monitoring, tracking, and analyzing budget hearings, and conference committee actions. This requires the incumbent to: prepare budget schedules/calendars for the Budget Officer and Executive staff, assign necessary follow-up to appropriate staff, and coordinate calendar invites with the Director's Office. Facilitate response coordination, the incumbent will facilitate the meeting, and any required follow up. Responds to ad hoc requests for budget-related information from the Department of Finance, and independently represents the Budget Office in response to these inquiries. This position will develop, and maintain the tracking process, and the SharePoint page, or other appropriate software, to be used as the database for information to be accessed for future reference and verified for completeness. The incumbent shall provide policy and fiscal coordination and consultation to program staff, supervisors, and managers as needed to best present the department's budget requests to the legislature, including, but not limited to; coordinate the preparation of talking points for sensitive issues by program leads, and review budget summary documents for hot topics. Talking points are prepared by Deputy Directors, and their teams, reviewed by the incumbent, and Budget Officer, and then routed to the Director, and Chief Deputy Directors for use during public Legislative hearings. Oversees the compilation and submission of budget information to the Department of Finance, the Legislative Analyst's Office, legislative staff, and other governmental agencies as requested and required through the state budget process.</p>
25%	E	<p>Budget Maintenance Assists, prepares and processes Department of Finance Budget Letters consistent with the directives and in accordance with the Budget Act Control Section, to ensure accurate and timely development of the Governor's Budget</p>

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and annual Budget Act, including accurate reporting PeopleSoft, Hyperion, and Microsoft Office (MS). Assesses the status of Budget Act appropriations at fiscal year-end and develop accruals for all outstanding adjustments required for the annual financial statements. Works with program and other staff to develop updates to the budget galley narrative and related program workload indicators. Calculates and updates position costing sheet annually. Maintain department appropriation worksheet. Aids in preparation of Budget Act section letters and budget revisions.

10% E

Special Projects

Designs, develops, and maintains standard and ad-hoc financial management reports that assist senior and Executive management. Participates in meetings with departmental programs, Accounting, and Budgets staff. Serves as a representative of the Budget Officer on sensitive financial matters. Serves as a back up to the SSM I Budget Specialist.

5% E

Perform other work-related duties as required.

Other Expectations

- Excellent attendance, punctuality, dependability, and work habits.
- Experience using Excel, Word, and Outlook.
- Ability to communicate effectively orally and in writing.
- Excellent organizational, interpersonal, and analytical skills.
- Shows initiative in making work improvements, identifying and correcting errors, and initiating work activities.
- Successfully completes quality work assignments and meets deadlines, as required.
- Ability to be flexible and adaptable to frequent workload changes based on organizational priorities and work under pressure for time-sensitive, high priority projects.
- Knowledge of state budgetary processes.
- Adheres to all HCAI policies and procedures.
- Demonstrates a commitment to performing duties in a manner consistent with HCAI’s vision, mission, goals, and core values.
- Demonstrates a commitment to maintaining a work environment free from discrimination, sexual harassment and hostility; and supports HCAI’s commitment to equal employment opportunities.
- Recognizes the needs of others and treats others with respect and dignity.

To Be Signed by the Employee and Immediate Supervisor

I have read and understand the duties and expectations of this position

I have discussed the duties and expectations of this position with the employee.

Employee Signature/Date

Supervisor Signature/Date