



STATE OF OREGON  
POSITION DESCRIPTION

Position Revised Date:  
6/17/2025

Agency: Department of Consumer & Business Services

Facility: Labor & Industries Building

☐ New

☒ Revised

This position is:

☒ Classified

☐ Unclassified

☐ Executive Service

☐ Mgmt Svc – Supervisory

☐ Mgmt Svc – Managerial

☐ Mgmt Svc - Confidential

SECTION 1. POSITION INFORMATION

a. Classification Title: Compliance Specialist 2 b. Classification No: C5247  
c. Effective Date: October 1, 2026 d. Position No: 3000.617  
e. Working Title: Reimbursement Specialist f. Agency No: 44000  
g. Section Title: Performance Section (Self-Insurance, Registration, and Reimbursements Unit) h. Budget Auth No: 000225550  
i. Employee Name: \_\_\_\_\_ j. Repr. Code: OAS  
k. Work Location (City – County): Salem – Marion

l. Supervisor Name: Jason Cupp

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year  
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☐ Exempt ☒ Non-Exempt If Exempt: ☐ Executive ☐ Administrative ☐ Professional ☐ Computer  
o. Eligible for Overtime: ☒ Yes ☐ No

SECTION 2. PROGRAM AND POSITION INFORMATION

- a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Department of Consumer and Business Services (DCBS) is Oregon's largest business regulatory and consumer protection agency. The department administers state laws and rules to protect consumers and workers in the areas of workers' compensation, occupational safety and health, financial services, insurance and building codes.

DCBS consists of the Workers' Compensation Division; Oregon Occupational Safety and Health Division; Division of Financial Regulation; Building Codes Division; Small Business Ombudsman; and Ombudsman for Oregon Workers. The department provides shared services to all divisions through the Director's Office and Central Services Division. The department also provides shared services to the Workers' Compensation Board. DCBS employs 950 employees and has a biennial operating budget of approximately \$685 million.

The Workers' Compensation Division administers, regulates, and enforces the law to protect benefits related to workers' on-the-job injuries and illnesses, while providing a positive business climate for Oregon businesses. Workers, employers, insurance companies, medical and vocational providers, attorneys, service companies and others participate in the workers' compensation system. The division has 175 positions and a biennial operations budget of approximately \$60 million. The division is led by the Administrator's Office and is organized into four sections: Modernization Operations, Performance, and Resolution.

**WCD's mission:** "We ensure an equitable workers' compensation system for all."

The **Performance Section** has responsibility for enforcing the workers' compensation laws relating to employer coverage, claims processing, worker leasing, and ensuring timely and appropriate benefits are provided to injured workers. Section staff certify self-insured employers and license worker leasing companies. They investigate subject Oregon employers for compliance with coverage requirements. They ensure the accuracy of disbursement and receipt of monies from and to the various reserves, reimbursing over \$50 million annually to insurers from those funds. Through information provision, education and outreach, audits, investigations, contract review, sanctions, and penalties, staff ensure proper claims management by all Oregon insurers and self-insured employers, and their service companies. The Performance Section consists of three units: Employer Compliance, Audit, and Self-Insurance, Registration, and Reimbursements.

The **Self-Insurance, Registration, & Reimbursements (SIRR) Unit** is responsible for processing applications from insurers, self-insured employers, and service companies, certifying, monitoring, and auditing self-insured employers, ensuring adequate securitization for their claim liabilities, and authorizing service agreements for service companies. Additionally, the unit processes insurer and self-insured employer reimbursement requests for the various Workers' Benefit Fund programs and authorizes decertified and bankrupt self-insured employer claim payments. The unit also has oversight of worker leasing companies providing services in Oregon. The Worker Leasing team educates, processes applications, licenses, audits, and takes corrective action against noncompliant worker leasing companies.

- b. **Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:**

Perform audits of applications from the workers' compensation insurance industry and to authorize reimbursement from the various Department of Consumer and Business Services reimbursement programs within the Workers' Benefit Fund.

### SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

| % of Time | N/R/NC | E/NE | DUTIES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------|--------|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ongoing   |        |      | <p><i>Perform position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully. Engage in effective team participation through willingness to assist and support co-workers, supervisors, and other work-related associations. Develop good working relationships with division and agency staff and supervisors through active participation in accomplishing group projects and in identifying and resolving problems in a constructive manner. Demonstrate openness of constructive feedback and suggestions, in an effort to strengthen work performance. Contribute to a positive, respectful and productive work atmosphere.</i></p> <p><i>Foster and promote the importance and value of a diverse, discrimination and harassment free workplace. Respect diversity of opinions, ideas, and cultural differences. Support outreach and diversity related efforts in order to diversify the workforce.</i></p> <p><i>Regular attendance is an essential function required to meet the demands of this job and to provide necessary services.</i></p> |
| 95%       |        | E    | <p>Interpret and apply statute, rule and bulletin requirements in order to audit applications from insurers and self-insured employers for reimbursement from the Retroactive, Reopened Claims, Handicapped Workers, Supplemental Disability, and Reemployment Assistance Programs. Determine validity and accuracy of calculation of payments and authorize reimbursement.</p> <p>Provide expertise and assistance through written and verbal communication to insurance industry personnel, up to and including management level, employers, injured workers, attorneys, and other interested parties concerning questions</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

|             |  |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------|--|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|             |  |   | <p>relating to the 6 audit programs, including interpretation and application of statutes, rules and bulletins.</p> <p>Coordinate assigned reimbursement programs including audit preparation, work distribution, and training not requiring supervisory oversight. Accountable for ensuring timely and accurate completion of audits. Develop and revise internal procedures, bulletins and Administrative Orders.</p> <p>Analyze settlements requesting reimbursement contributions. Evaluate reasonableness of potential future liability to the reserve in relation to settlement reimbursement. Develop proposed recommendation for department response in accordance with applicable statutes and rules.</p> <p>Compile and analyze Social Security Disability Insurance benefit data obtained from the Social Security Administration, insurers, workers, and attorneys. Calculate and authorize Social Security Offsets in accordance with applicable statutes and rules.</p> <p>Review and update all reimbursement program procedures.</p> |
| 5%          |  | E | Other duties as assigned                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <u>100%</u> |  |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## SECTION 4. WORKING CONDITIONS

**Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.**

This job is performed in a typical office environment on a regular 8:00 a.m. to 5:00 p.m. schedule. Occasionally may have either personal or telephone contact with hostile claimant with regard to social security offsets. Occasional reaching, stooping, bending and lifting of not more than 10 pounds may be required.

This position is eligible for remote work on a part-time basis once the incumbent has gained the proficiency to perform work independently. However -- regular, scheduled office hours are also required.

## SECTION 5. GUIDELINES

**a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.**

Oregon Revised Statutes  
 Oregon Administrative Rules  
 Department Bulletins  
 Government Auditing Standards  
 Agency policies and desk procedures  
 National Council on Compensation Insurance Rules  
 Insurance Division Rules  
 Case Law  
 Generally accepted accounting and auditing principles

**b. How are these guidelines used?**

Used as a basis for audit programs, conducting the audit, reference and authorities.

## SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

| Who Contacted                                                                                                                | How                                                | Purpose                                                                                                                          | How Often? |
|------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|------------|
| <b>Note:</b> If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter". |                                                    |                                                                                                                                  |            |
| Insurers, self-insured employers and management personnel, third-party administrators                                        | In person on-site, in writing, email, and by phone | Plan and perform audits and follow-up. Conduct entrance and exit interviews with findings and recommendations. Conduct training. | Daily      |
| Agency staff, all levels                                                                                                     | In person, in writing, e-mail, and by phone        | Interaction required to perform daily work                                                                                       | Daily      |

## SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Decisions as to how each audit will be conducted to accomplish intent of specific program including making recommendations to management based upon audit findings.

Interpretation and application of statutes, rules, and case law requiring judgment analysis and development of recommendations.

Amount and degree of potential future claim liability, individually and in aggregate as the basis for regulated parties to securitize these liabilities.

Audited parties' adherence to regulations and determination of enforcement actions, including civil penalties, are warranted.

Decisions on issues can be controversial, sensitive in nature, and could have significant financial impact on self-insured employers, claimants, the Department, and the insurance industry as a whole.

## SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

| Classification Title                                                                                                         | Position Number | How                                                                   | How Often | Purpose of Review |
|------------------------------------------------------------------------------------------------------------------------------|-----------------|-----------------------------------------------------------------------|-----------|-------------------|
| <b>Note:</b> If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter". |                 |                                                                       |           |                   |
| Compliance & Regulatory Manager 1                                                                                            | 3000.079        | Daily, weekly, or as needed to evaluate activities and audit results. |           |                   |

**SECTION 9. OVERSIGHT FUNCTIONS****THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY**

- a. How many employees are directly supervised by this position? 0  
How many employees are supervised through a subordinate supervisor? 0
- b. Which of the following activities does this position do?
- |                                                  |                                                                   |
|--------------------------------------------------|-------------------------------------------------------------------|
| <input type="checkbox"/> Plan work               | <input type="checkbox"/> Coordinates schedules                    |
| <input type="checkbox"/> Assigns work            | <input type="checkbox"/> Hires and discharges                     |
| <input type="checkbox"/> Approves work           | <input type="checkbox"/> Recommends hiring                        |
| <input type="checkbox"/> Responds to grievances  | <input type="checkbox"/> Gives input for performance evaluations  |
| <input type="checkbox"/> Disciplines and rewards | <input type="checkbox"/> Prepares & signs performance evaluations |

**SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION**

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

**Special Requirements:**

Position is subject to a criminal background check.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

| Operating Area                                                                                                               | Biennial Amount (\$00000.00) | Fund Type |
|------------------------------------------------------------------------------------------------------------------------------|------------------------------|-----------|
| <b>Note:</b> If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter". |                              |           |
|                                                                                                                              |                              |           |
|                                                                                                                              |                              |           |
|                                                                                                                              |                              |           |
|                                                                                                                              |                              |           |
|                                                                                                                              |                              |           |

**SECTION 11. ORGANIZATIONAL CHART**

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

**SECTION 12. SIGNATURES**

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Employee Signature

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Date

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Supervisor Signature

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Date

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Appointing Authority Signature

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Date