Click here to link to instructions **All positions in OHA require a Criminal Background Check and an Abuse/Neglect Check. Fingerprints may be required.**

STATE OF OREGON
Oregon Health Authority (OHA)
POSITION DESCRIPTION

Position Revised Date: 09/25/2026

Agency: Oregon Health Authority

Division: Oregon Public Health Division

☐ 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: Administrative Specialist 2
b. Classification No: C0108 **c.** Effective Date: 7/1/2019
d. Position No: 1018735
e. Working Title: Fiscal Operations Assistant
f. Agency No: 44300
g. Section Title: HIV-STD-TB
h. Employee Name:
i. Work Location (City — County): Portland – Multnomah
j. Supervisor Name: Myriam Polanco-Allen
k. Position: ☐ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year ☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share
l. FLSA: ☐ Exempt ☒ Non-Exempt If Exempt: ☐ Executive ☐ Professional ☐ Administrative **m.** 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 Oregon Health Authority (OHA) is the organization at the forefront of lowering and containing costs, improving quality, and increasing access to health care in order to improve the lifelong health of Oregonians. OHA is responsible for most state health services and for implementing the health care reforms in House Bill 2009. The agency is comprised of eight divisions: Agency Operations, Equity and Inclusion, External Relations, Fiscal and Operations, Health Policy and Analytics, Health

Systems, Oregon State Hospital and Public Health. The Oregon Health Policy Board (OHPB) serves as the policymaking and oversight body of OHA and is responsible for working towards comprehensive health reform in our state. The nine-member board is comprised of community members from across the state who have an interest in health and health care and have strong relationships with the communities they represent.
OHA Vision: A healthy Oregon.

OHA Mission: Ensuring all people and communities can achieve optimum physical, mental, and social well-being through partnerships, prevention, and access to quality, affordable health care.

To fulfill OHA's vision and mission, the agency is developing a strategic plan with a single overarching goal: eliminate health inequities in Oregon by 2030.
OHA definition for Health Equity:

Oregon will have established a health system that creates health equity when all people can reach their full potential and well-being and are not disadvantaged by their race, ethnicity, language, disability, age, gender, gender identity, sexual orientation, social class, intersections among these communities or identities, or other socially determined circumstances.

Achieving health equity requires the ongoing collaboration of all regions and sectors of the state, including tribal governments to address:

- *The equitable distribution or redistribution of resources and power; and*
- *Recognizing, reconciling and rectifying historical and contemporary injustices.*

Core Values: Health Equity, Service Excellence, Integrity, Leadership, Partnership, Innovation, and Transparency.

The Office of the State Public Health Director
The Office of the State Public Health Director (OSPHD) guides the strategy, operations, and policy of public health programs within the division, and assures an effective and coherent public health system for Oregon. This includes extensive interactions with a range of state and local agencies and organizations, health care providers, federal agencies, and the private sector.

The Division's work affects all Oregonians. Many of the programs overseen by the Office of the State Public Health Director are administered in collaboration with Oregon's 34 local health departments, healthcare systems and partners. The Division has approximately 700 FTE and is responsible for oversight of $524.3 million biennially.

Under the leadership of the Office of the State Public Health Director, the Division is organized by three centers:

The Center for Health Protection
The Center for Public Health Protection protects the health of individuals and communities through establishing, applying and ensuring reliable compliance with regulatory and health-based standards. The Center's diverse programs work closely with other federal, state and local agencies, regulated entities and active stakeholder groups. The Center's work emphasizes

continuous process improvement, technical assistance, scientific assessment, ongoing monitoring and risk communication to protect the health of all people in Oregon.

The Center for Prevention and Health Promotion
The Center for Prevention and Health Promotion houses community-oriented preventive clinical and community health services and supports the policy, systems and environmental changes that promote good health. This Center guides and supports healthy communities through data collection, analysis and reporting; by supporting the Governor's priorities around tobacco, obesity and early learning; and, by acting as a point of contact with the healthcare system on certain key clinical prevention practices. This center will work with many partners, including local public health, childcare facilities, schools, worksites, healthcare providers, transportation, and the private sector to ensure that we reduce preventable injury, illness, and death and promote good health.

The Center for Public Health Practice
The Center for Public Health Practice provides services to prevent and control diseases, monitor vital events, and assure an effective statewide public health system. CPHP programs work closely with local and tribal governments, community partners, and the public to protect and improve the health of all people in Oregon. Special emphasis is placed on communicable diseases, including epidemiology, laboratory testing, immunization, and other community control measures. CPHP screens all newborn infants for biochemical disorders to prevent disability or death and collects and analyzes vital record data to monitor health trends. The quality of statewide public health services is assured through consultation, planning, review, and accreditation of state and local agencies.

This Center’s work affects all Oregonians. Many of the programs overseen by this Center are administered in collaboration with Oregon’s local health departments. This center has approximately 245.9 FTE and a total estimated biennial budget of $93.9 million.

Human Immunodeficiency Virus (HIV), Sexually Transmitted Disease (STD), Tuberculosis (TB) Section.
The Center for Public Health Practice, HIV/STD/TB (HST) Section works to reduce the rates of gonorrhea, syphilis, and chlamydia infections, eliminate new HIV infections, improve health outcomes of persons living with HIV, and reduce the incidence of tuberculosis (TB) disease among Oregonians. In Oregon, incidence and access to prevention and treatment services related to HIV, STD, and TB demonstrate the effects of social determinants of health and intersectionality and the need for improved health equity:

• People of color are overrepresented in HIV, STD, and TB diagnoses.
• HIV and TB disproportionately affect persons experiencing homelessness, persons with a history of incarceration, and persons who use drugs.
• Women, younger people, and people of color are less likely to be prescribed HIV pre-exposure prophylaxis (PrEP).
• Among people living with HIV, younger people, people of color, people who inject drugs and people living in rural Oregon counties are each less likely to be virally suppressed.

HST programs include HIV Surveillance, HIV Prevention, STD Prevention, the Tuberculosis Program, HIV Community Services, Oregon Housing Opportunities in Partnership and CAREAssist. The Section is responsible for data collection and surveillance activities, data dissemination, epidemiologic analysis, facilitating community led planning, coordinating disease intervention and contact notification, ensuring access to treatment, managing client service programs, providing education and technical assistance.

Our work strives to:

Ensure equal opportunity to achieve the highest attainable level of health for all populations through policies, programs and strategies that respond to the cultural factors that affect health. Correct historic injustices borne by certain populations. Prioritize development of strong cultural responsiveness by public health organizations.

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:

support the CAREAssist program by providing essential administrative and financial coordination to ensure accurate and compliant operations. Key responsibilities include fiscal support activities, refund processing, invoice reconciliation, accounts payable functions, and monitoring program rebating activities. The role works closely with the program's Pharmacy Benefit Manager (PBM) to resolve discrepancies, support accurate claims processes, and maintain smooth benefit delivery. Overall, this position strengthens CAREAssist's financial integrity and operational efficiency, helping the program deliver reliable services to clients across Oregon.

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.

Note: *If additional rows of the below table are needed, place cursor at end of a row (outside table)*

% of Time	N/R/ NC	E/ NE	DUTIES
50%	R	E	**Fiscal Operations** 1. Establish and maintain fiscal procedures, controls, and documentation necessary to carry out assigned program financial activities, ensuring alignment with Federal and State requirements and agency policies. 2. Support client premium payments processes for all insurance types; in a backup role to batch, reconcile, and ensure accurate financial posting within required timelines.

			3. Reconcile Visa charges per SPOTS program policies; coordinate submission of SPOTS logs, and collaborate with the PBM to resolve SPOTS payments involving out-of-network adjudication or in-contract pharmacies. 4. Reconcile CAREAssist financial warrants for claims, insurance payments, and pharmacy transactions, ensuring accuracy and resolving discrepancies. 5. Process refund checks and expenditures reversals, ensuring proper documentation, compliance, and communication with internal and external stakeholders. 6. Coordinate, process, and evaluate out-of-network pharmacy exception SPOTS payments, ensuring policy adherence and proper fiscal tracking. 7. Assist with medical and insurance recovery efforts, including retroactive changes, overpayments, duplicate payments, reversals, rebilling, and refund processing. 8. Provide backup and support for other fiscal operations such as maintaining vendor profiles, data entry, preparing notices, processing invoices, and issuing refunds. 9. Update and document administrative support processes for fiscal operations policy and procedures to ensure clarity, consistency, and compliance. 10. Seek vendor refunds and work directly with vendors and fiscal partners to resolve incorrect or duplicate payments. 11. Gather, analyze, and monitor fiscal data from multiple databases; and coordinate with other fiscal and IT staff to request or resolve data/reporting issues. 12. Develop historical program knowledge to support fiscal decision-making related to pharmacy benefits, eligibility processes, and insurance components of the program. 13. Participate in evaluating fiscal processes and recommend improvements to strengthen the program's overall financial functions and internal controls. 14. Assist in updating fiscal process changes as the program evolves, ensuring staff are informed and documentation is current. 15. Cross-train on other Administrative Specialist 2 fiscal duties to support program continuity and coverage. 16. Collaborate within a team to provide fiscal oversight supporting program improvement, financial integrity, and adherence to applicable laws, policies, and procedures. 17. Interpret laws, rules, policies, and procedures and apply these interpretations to fiscal situations, including non-routine or complex cases; negotiate resolutions to achieve compliance or resolve issues.

			18. Assist coordinating fiscal aspects of interagency agreements, contracts, RFPs, or other formal documents; ensure alignment with program goals and compliance requirements. 19. Assess fiscal operational needs and identify training requirements or necessary changes to policies and procedures; support staff development in fiscal processes. 20. Communicate regularly with agency staff, external partners, and the public to provide or obtain information, resolve financial questions or complaints, and negotiate fiscal solutions. 21. Work independently under general supervision, managing assigned fiscal tasks, resolving problems, and ensuring adherence to deadlines, laws, administrative rules, and agency policies. 22. Support management in developing fiscal components of long- and short-range program goals through data analysis, operational feedback, and evaluation of evolving financial needs.
25%	R	E	**Pharmaceutical Rebating (340B/AIDS Crisis Task Force)** 1. Compile quarterly rebate reports in collaboration with the PBM (Ramsell); review data for accuracy, resolve data-integrity issues, and ensure adherence to applicable laws, rules, and program procedures. 2. Monitor rebate payments owed by manufacturers via PMB reports, conduct regular follow-up with the PBM and Program Manager to best facilitate timely payment of invoiced rebate amounts. 3. Receive and receipt manufacturer rebate payments; ensure accurate documentation, reporting to the PBM, and reconciliation within program financial systems. 4. Perform data entry and maintain comprehensive records of rebates received, ensuring documentation supports auditing, reporting requirements, and financial integrity. 5. Attend biweekly Ramsell meetings, provide rebate process updates, and assist with monitoring and improving rebate workflows and financial processes. 6. Conduct administrative research, financial data analysis, and evaluation of rebate program trends; prepare reports with recommendations to resolve issues, improve processes, or enhance program compliance. 10. Interpret laws, rules, policies, and procedures related to pharmaceutical rebates and apply those interpretations to

			both routine and non-routine financial situations; negotiate solutions when discrepancies arise. 11. Assist management in developing long- and short-range financial goals for rebate operations by analyzing fiscal data, projecting trends, and evaluating operational effectiveness. 12. Communicate regularly with internal staff, State and Federal partners, manufacturers, PBM staff, and other stakeholders to provide or request fiscal information and resolve financial issues.
25%	R	E	**Other Administrative Support** 1. Answer and direct incoming program phone calls and respond to requests for information. 2. Manage incoming and outgoing mail, including sorting, distributing, and preparing mailings. 3. Perform filing and records maintenance, ensuring documents are organized and accessible. 4. Scan, upload, and track documents to support program recordkeeping requirements. 5. Monitor and manage program email inboxes, routing messages to appropriate staff and responding to general inquiries. 6. Provide general office support, such as data entry, scheduling, and maintaining office supplies. 7. Support case workers by preparing documents, retrieving case files, and assisting with administrative tasks as needed. 8. Support ORCares trainer in training/webinars and data analyst in data collection 9. Participate in staff and team meetings, providing administrative insight and updates. 10. Provide coverage for staff, performing essential administrative duties when colleagues are unavailable. 11. Perform other assigned administrative duties to support program operations.
At All Times	R	E	1. Demonstrate recognition of the value of individual and cultural differences; create a work environment where talents, abilities and experiences of others are valued. Consistently treats Tribes, community members, partners, co-workers, vendors, patients and consumers with dignity and respect. Create and maintain an inclusive environment for all staff. 2. Commitment to ongoing personal and professional development on the topics of anti-racism, elimination of health

			inequities, trauma-informed and resiliency practices, social determinants of health and equity, universal accessibility and development of diverse and inclusive work

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.

Significant amount of work on computers is required. Must be comfortable regularly working in a secure office environment. The work of this role will be conducted oniste.

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:

- Policies, manuals, or desk procedures:
- Oregon Administrative Rules (CAREAssist)
- Oregon Revised Statues
- HIV Care & Treatment Program Policies & Procedures
- CAREAssist Fiscal Policy and Procedures
- OHA Policies and Procedures
- DOJ and OHA contract Policies and Procedures
- Basic knowledge of Generally Accepted Accounting Principals
- Analytical research procedures and methods
- HIPAA
- Personnel Rules
- Oregon Health Authority and Department of Administrative Services Policies
- Database Manuals
- SPOTS and state purchasing guidelines
- Confidentiality policy and regulations

b. How are these guidelines used?

Guidelines will be used as guidance to this position while performing work described above. Additionally, guidelines will be used to ensure program compliance, answer programmatic questions and research policy issues/needs.

SECTION 6. WORK CONTACTS

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

Note: *If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".*

Who Contacted	How	Purpose	How Often?
PBM, pharmacy manufacturers, wholesalers	Email/Phone/Fax	Payment, invoicing	Weekly
Healthcare/Pharmacy providers	Email/Phone/Fax	Payment	Weekly
Program clients	Email/Phone/In Person	Receipt of information, payments	Weekly
Health Departments & Community Based Organization	Email/Phone/Fax	Coordination of services	Weekly

SECTION 7. POSITION-RELATED DECISION MAKING

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

Actions and decisions made by this position will contribute to the overall success and quality of the program and services to clients. This position will work independently once work is assigned. The position ensures fiscal operations are maintained. Position must be familiar with fiscal processes and procedures, fiscal systems, tracking mechanisms for fiscal payment and invoicing. Position has the responsibility to problem solve operational issues to resolution in a fast- paced environment and to recognize when to relay critical issues to a higher level for quick resolution.

The position identifies problem areas and resolves issues that do not have programmatic or policy implications and notifies managers how issues were resolved. Issues that need policy directive are brought to the attention of management. Judgment is used in locating and selecting the most appropriate guidelines for varying circumstances. Failure to identify issues timely and correctly and make decisions and recommendations could jeopardize the ability to manage program budgets and remain solvent.

Actions and decisions made by this position will contribute to the overall success and quality of the program. This position will use written policy and procedure to accomplish tasks.

1) Determines client eligibility for medical and pharmacy payments.
2) Makes decisions related to types of payments to be made on behalf of program clients.

3) Determines need for OIS assistance with database/reporting issues.
4) Composes oral and written communications independently.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Note: *If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter"*

Classification Title	Position Number	How	How Often	Purpose of Review
Principal Executive Manager	1013459	Direct Supervision	Weekly or as needed	Performance, work planning, development
FA2		Verbal, written	Daily or as needed	Identify ongoing needs of the position, new rebating work, invoices

SECTION 9. OVERSIGHT FUNCTIONS

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?

- ☐ Plan work
- ☐ Assigns work
- ☐ Approves work
- ☐ Responds to grievances
- ☐ Disciplines and rewards
- ☐ Coordinates schedules
- ☐ Hires and discharges
- ☐ Recommends hiring
- ☐ Gives input for performance evaluations
- ☐ Prepares and 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.

All positions in OHA require a Criminal Background Check and an Abuse/Neglect Check. Fingerprints may be required.

Registration in the Health Alert Network (HAN) to receive important public health alerts and emergency notifications. This position is designated as Essential Personnel in the event of an emergency.

Technology skills set to keep all data secure.

Experience in:
- High-level proficiency in using computers and data systems.
- Financial process and procedure, use of SFMA/Hyperion.
- Payment processing and reconciliation.
- Effective communication on phone, in person, in writing.
- Accurate data entry.
- Excellent customer service.

Advanced knowledge of:
- Principles of financial transactions and systems.
- Use of datasets, spreadsheets (i.e. MS Excel)

Ability to:
- Demonstrate initiative and independent judgement on an ongoing basis.
- Identify problems, research, track and follow up to a final resolution.
- Maintain high level of organization over multiple tasks with attention to detail.
- Self-manage competing priorities within a heavy workload and able to shift priorities to meet program needs.
- Take ownership of tasks, maintain work plan to ensure competing priorities are identified and a plan is in place to meet all timelines.
- Work collaboratively in a team setting and contribute to a positive, respectful and productive work environment.
- Utilize and State Visa card, follow all State of Oregon policy and procedure.
- Adhere to policy and procedure, to include privacy and security law and guidelines.
- Participate in continuous quality improvement program activities.

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

Note: *If additional rows of the below table are needed, place cursor at end of a row (outside table)*

Operating Area	Biennial Amount ($00,000.00)	Fund Type

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

Employee Signature	Date
Supervisor Signature	Date
Appointing Authority Signature	Date