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: 5/22/2026

Agency: Oregon Health Authority

Division: Office of Actuarial and Financial Analytics

☒ 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: Fiscal Analyst 2
b. Classification No: C1244 **c.** REPR Code: OAH
d. Position No: 1025742
e. Working Title: Financial Analyst
f. Agency No: 44300
g. Section Title: Office of Actuarial and Financial Analytics
h. Employee Name: VACANT
i. Work Location (City — County): Portland, Multnomah
j. Supervisor Name: Rebecca Level
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 ☐ Computer **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.

OHA values health equity, service excellence, integrity, leadership, partnership, innovation, and transparency. OHA's health equity definition is "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." OHA's 10-year goal is to eliminate health inequities.

The Office of Actuarial and Financial Analytics, as part of the Fiscal Operations Division, is aligned with the Oregon Health Authority's core values of partnership, service excellence, leadership, integrity, health equity, innovation, and transparency. In our practice, these values are expressed through:

Service Excellence:
- Understanding and responding to Oregon public health needs and the people we serve
- Pursuing our commitment to innovation and science-based best practices
- Fostering a culture of continuous improvement

Leadership:
- Building agency-wide and community-wide opportunities for collaboration
- Championing public health expertise and best practices
- Creating opportunities for individual development and leadership

Integrity:
- Working honestly and ethically in our obligation to fulfill our public health mission
- Ensuring responsible stewardship in public health resources

Health Equity:
- Eliminating health disparities and working to attain the highest level of health for all people
- Ensuring the quality, affordability, and accessibility of health services for all Oregonians
- Integrating social justice, social determinants of health, diversity, and community

Partnership:
- Working with partners and communities to protect and promote the health of all Oregonians
- Seeking, learning from, and respecting internal and external ideas and opinions
- Exploring and defining the roles and responsibility of public health staff and partners

Innovation:
- We are not satisfied with the status quo if there are new and better ways to meet the needs of the people we serve. We bring creativity, experience, and openness to our search for solutions to problems. We pursue opportunities to develop new evidence to evolve our practices.

Transparency:
- We communicate honestly and openly, and our actions are upfront and visible. We provide open access to information and meaningful opportunities to provide input and participate in our decision-making.

Insert section/unit description here:

The Oregon Health Authority (OHA) contracts with Coordinated Care Organizations (CCOs) to manage and deliver integrated services that include Physical Health, Behavioral Health, and Dental Services to the majority of Oregon's Medicaid population. The Office of Actuarial and Financial Analytics (OAFA), in collaboration with a contracted actuarial firm (Mercer), develops actuarially sound capitation rates on an annual basis. The process and methodology used to develop capitation rates are governed by state and federal regulations, specifically the Centers for Medicare and Medicaid Services (CMS). CMS requires Oregon's capitation rates be Actuarially Sound and follow applicable Actuarial Standards of Practice. In addition to CCOs, capitation rates

are also developed separately for the non-Medicaid programs Healthier Oregon Program (HOP) and The Basic Health Plan (BHP). The annual rate development starts in April and concludes in September of each year. During the off-season, OAFA works on a variety of special projects that continue to impact the rate development, including risk adjustment, policy changes, legislative impacts, mid-year rate amendments (if needed) and benefit pricing reviews.

OAFA also is responsible for the review of the financial reporting and solvency tracking for all the CCO entities and risk-based examinations of the CCOs at least once every five years. OAFA reviews CCO-prepared financial reports on a quarterly and annual basis. This also includes a detailed review of each CCO's Medical Loss Ratio (MLR) and other financial indicators. The MLR indicates a CCOs ratio between medical costs compared to the revenue received by the CCO in capitation rates. If a CCO has an MLR lower than 85%, then the CCO will owe the state money back in the form of a rebate. In addition to MLR rebate settlements, OAFA also completes all risk corridor settlements. Risk corridors are used to mitigate the risk a CCO carries for specific services or members and may result in the CCO owing money to OHA or OHA owing money to the CCO.

In addition, OAFA focuses on data integrity with CCOs by providing opportunities to review and correct encounter data used in rate setting through distributions of raw datasets and dashboards. OAFA also provides a variety of clinic and provider level rate reviews that include Federally Qualified Health Clinics (FQHCs), Rural Health Clinics (RHCs), and reviewing the reimbursement paid to providers through the Fee-For-Service program

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:

The purpose of this position is to review financial oversight and performance against the Oregon administrative rules and the Centers for Medicare and Medicaid Services (CMS) waiver requirements, and suggest and develop additional points of oversight that OHA can do to remain compliant, as well as conduct regular financial analysis of the National Association of Insurance Commissioners (NAIC) filings and forms, and communicate with external stakeholders in assessing compliance with legal requirements relating to reporting of financial matters.

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) and hit "Enter".*

% of Time	N/R/NC	E/NE	DUTIES

45%	N	E	Collaborate closely with current CCO Financial Analyst 2 to modify or develop current financial reporting oversight of CCO/MCE operations. This individual would perform the primary analyst role in creation and tracking of new deliverables resulting from federal and Oregon Medicaid programmatic changes. Track and report on fiscal impacts and policy analysis to provide historical data and present results of financial trends and analysis to Executive Management. This includes modeling of potential outcomes based upon the proposed changes being introduced and provides executive leadership concrete examples using historical trend and financial modeling to inform decision making.
30%	N	E	Prepares narrative that is specific to each CCO/MCE entity based upon interpretation of information and data gathered during analysis. This narrative is continually updated and outlines the risk profiles including any changes from prior period that could increase, decrease, or stay static for determining risks of solvency or ongoing business. The narrative should follow the standards set by the National Association of Insurance Commissioners, which is used by state regulators to share the financial health and regulatory status of regulated entities. This would also require close collaboration with the current Operations & Policy Analyst 4 tasked with review of the NAIC Insurance Holding Company System Regulatory and Reporting forms.
20%	N	E	Verifies that all annual deliverables provided by state and federal law that meet Oregon statues, administrative rules and NAIC suggested requirements. Uses analytical skills to perform review of CCO/MCE deliverables provided annually: • Reinsurance contracts to ensure entities are in compliance with SSAP reporting requirements. Assists the assigned actuary to determine adequacy of the insurer's reserves. • Articles of Incorporation • Bylaws • Board of Director meeting minutes • Verifies that reinsurance, safekeeping agreements, fidelity bond, and other insurance coverage Develops analysis of financial ratios, comparative analysis techniques, and compilation of and direct engagement with external financial contacts at CCO/MCE on variants in these measures.

			Provides fiscal consultation and is responsible for preparation and presentation of results of analysis to executive management to OHA key executives that is specific to each CCO/MCE entity based upon interpretation of information and data gathered during analysis. This narrative is continually updated and outlines the risk profiles including any changes from prior period that could increase, decrease, or stay static for determining risks of solvency or ongoing business.
5%	N	E	Performs various projects and analyses assigned by the Finance and Reporting Manager or the CCO Finance Director. This includes serving on various internal workgroups and task forces as requested.
Ongoing			Participate in Health Equity, Diversity and Inclusion efforts (i.e. training, meetings, projects) Other duties or projects as assigned by management

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.

- Work is performed in a fast paced office environment that can be politically sensitive at times.
- Extended work hours, including early mornings, evenings and/or weekends as necessary.
- The position works a professional workweek and the employee's flexibility to this work schedule is considered a condition of employment. It is understood that the hours of work may vary from day to day and week to week.
- OHA is committed to affirmative action, equal employment opportunity and workplace diversity.

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, Generally Accepted Accounting Principles (GAAP), Statutory Accounting Principles, Federal laws, Policies and Initiatives; and Department of Administrative Services Policies and Guidelines

b. How are these guidelines used?

Reference to assure compliance with applicable laws, rules, policies and regulations.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact? When applicable, please identify contacts that might be virtual/ in-person, or both.

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?
OHA Members of Leadership	Phone/In person/Written	Provide Information, Seek Feedback, Provide Policy Clarification or Direction	Weekly
Office of Actuarial and Financial Analytics Staff	Phone/In person/Written	Provide Information, Seek Feedback, Clarify Agency Direction, Seek Policy Clarification or Direction	Daily
Office of Actuarial and Financial Analytics Manager	Phone/In person/Written	Provide Information, Seek Feedback, Clarify Agency Direction, Seek Policy Clarification or Direction	Daily
Coordinated Care Organizations and other contractors	Phone/In person/Written	Provide Information and direction, Seek Feedback	Weekly
Governor's Office Staff	Phone/In person/Written	Provide Information, Seek Feedback, Clarify Agency Direction, Seek Policy Clarification or Direction	As needed
Legislative staff/ members	Phone/In person/Written	Provide Information or Clarification	As needed
Federal Agencies	Phone/In person/Written	Provide Information, Clarify Agency Direction, Seek Policy Clarification	As needed
Media	Phone/In person/Written	Provide Information or Clarification	Occasional/in coordination with OHA Externals Affairs
Public	Phone/In person/Written	Provide Information or Clarification	Occasional

SECTION 7. POSITION-RELATED DECISION MAKING

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

Professional judgement is required to determine appropriate level of analysis to be performed. The fiscal analyst's decisions are made within parameters established by law, rules, policy and procedures. The position exercises judgement in providing interpretation and administration of agency policy and resolving day to day problems related to compliance with GAAP, CMS accounting and reporting standards, SSAP accounting and reporting standards, State and Federal regulations, DHS/OHA Office of Financial Services internal policies and procedures, Oregon Administrative Rules, and Medicare/Medicaid Cost reporting requirements.

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
Budget and Fiscal Administrator 3 - OHA Chief Financial Officer		Communicate and exchange information in person, written, and phone.	As needed	As necessary to ensure consistency with agency direction or compliance.
OHA's Budget and Fiscal Administrator 2 - OAFA CCO Finance Director		Communicate and exchange information in person, written and by phone	As needed	As necessary to ensure consistency with agency direction or compliance.
OHA's Budget and Fiscal Manager 3 – Finance and Reporting Manager		Communicate and exchange information in person, written and by phone	As needed	As necessary to ensure consistency with agency direction or compliance.

SECTION 9. OVERSIGHT FUNCTIONS *(Supervisory positions only)*

a. How many employees are directly supervised by this position? none

How many employees are supervised through a subordinate supervisor? none

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.

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Experience with complex health care finance and accounting systems. Specifically with Statutory accounting principles.

Experience with health care insurance financials.

Experience planning and executing complex

budgets.

Experience working with complex funding streams.

Working knowledge of the legislative branch and legislative processes.

Experience with reinsurance programs.

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) and hit "Enter".*

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	Jun 22, 2026 Date