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: 06/30/2026

Agency: Oregon Health Authority

Division: **Behavioral 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: Fiscal Analyst 2
b. Classification No: 1244 **c.** REPR Code: OAH
d. Position No: TBD
e. Working Title: Community Restoration Evaluation Unit (CREU), Aid & Assist Fiscal Analyst
f. Agency No: 44300
g. Section Title: Aid and Assist and Community Restoration Evaluation Unit (CREU)
h. Employee Name:
i. Work Location (City — County): Portland — Multnomah County — Hybrid
j. Supervisor Name: TBD - CREU and Aid and Assist Manager
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 Behavioral Health 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:

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

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

Integrity:

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

Leadership:

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

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 and seek new and better ways to meet the needs of the people we serve with creativity, experience and openness.
- We pursue opportunities to develop new evidence to evolve our practices.

Transparency:

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

Behavioral Health Division Description:

OHA is home to most of the state's publicly supported health programs. OHA divisions include Behavioral Health, Equity and Inclusion, Fiscal and Operations, Health Policy Analytics, Medicaid, Public Health, and the Oregon State Hospital.

The Behavioral Health Division helps Oregonians achieve physical, mental and social well-being by providing access to health, mental health and addiction services and supports to meet the needs of Oregon's adults and children. We accomplish this through collaboration with individuals, their families, counties and other state agencies, providers, advocates and communities.

Unit/Program Description

The Community Restoration Evaluation Unit (CREU) is a specialized program within the Behavioral Health Division (BHD). The unit is responsible for managing Oregon's statewide system for court-ordered competency re-evaluations for individuals placed in community restoration under ORS 161. This includes oversight of evaluator workflows, case assignment, quality assurance, policy implementation, data reporting, and cross-system coordination with courts, jails, the Oregon State Hospital, Community Mental Health Programs (CMHPs), Coordinated Care Organizations (CCOs), Tribal partners, and community restoration providers.

As part of BHD, CREU plays a central operational and policy role in Oregon's forensic behavioral health continuum. CREU supports BHD's broader mission by ensuring program fidelity, promoting integrated care, advancing court-ordered compliance initiatives, and providing consistent communication and oversight across diverse system partners.

The unit's work is closely tied to statewide mandates stemming from court orders and neutral expert recommendations that govern the delivery and timeliness of forensic services. CREU leads several critical initiatives to support this compliance framework, including:

- Enforcing court-driven timelines and restoration limits across the continuum to ensure that competency evaluations and restoration processes comply with legal requirements and support timely resolutions in the criminal legal system.
- Standardizing evaluator qualifications and report quality by implementing consistent statewide protocols, certification requirements, and quality assurance processes that enhance reliability, reduce delays, and support accurate court outcomes.
- Integrating discharge and community placement planning into the evaluation process so that every court-ordered evaluation includes guidance that accelerates transitions to the least-restrictive setting appropriate for each individual.
- Aligning policy and procedures with court-recommended compliance expectations, including the implementation of neutral expert recommendations, updated statutes, administrative rules, and judicially required performance metrics.

- Maintaining transparent data and reporting practices that provide courts, legislative partners, and OHA leadership with accurate, up-to-date information needed for decision-making and statewide operational accountability.
- Providing targeted workforce support, including evaluator training, supervision, technical assistance, and compliance coaching to strengthen the forensic evaluation workforce and ensure adherence to statewide standards.

Through these functions, CREU ensures that Oregon's community-based forensic evaluation system operates with consistency, transparency, and accountability. The unit directly supports statewide goals of improved court compliance, reduced reliance on hospital-level care, strengthened community-based treatment options, and better outcomes for individuals with behavioral health needs involved with the criminal legal system.

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 primary purpose of this position is to serve as CREU's primary budget and fiscal advisor—translating appropriations, spending patterns, and operational drivers into actionable guidance that keeps the program financially compliant, transparent, and able to meet service and court-driven obligations. In practice, the Fiscal Analyst 2 (FA2) researches financial needs; develops and coordinates program budgets; analyzes and forecasts revenue/expenditure trends; and produces complex, decision-ready reports so CREU leadership can choose among viable options when constraints or pressures emerge.

Within CREU, this role functions as the day-to-day fiscal operations integrator—monitoring fund utilization, reconciling program databases to accounting systems, validating data quality, and recommending corrective actions or process improvements (including automation with Information Systems (IS)). The FA2 also supports budget execution and adjustments (reallocations, deviation/contingency planning, supplemental request support) and coordinates with Department of Administrative Services (DAS) and the Legislative Fiscal Office (LFO) to resolve technical budget issues and keep plans aligned with legislative intent and funding rules (including federal/grant requirements where applicable).

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
At all times	NC	E	**Align Conduct with OHA's Values and 2030 Strategic Goal**

			• Demonstrate awareness, understanding and alignment in service delivery with the OHA Core Values of Health Equity, Service Excellence, Integrity, Leadership, Partnership, Innovation, and Transparency. • In addition to the cultivation of equitable practices across all aspects of the position description, learn and apply knowledge and skills to interrupt systemic racism and oppression of groups most impacted by historical and contemporary racism and social injustices. • Demonstrate recognition of the value of individual and cultural difference; demonstrate evidence of ongoing development of personal cultural awareness and humility; contribute to an inclusive work environment that is respectful and accepting of diversity and where talents and abilities are valued. • Contribute to a positive and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. • Model professional behavior. Interrupt and report inappropriate behaviors, especially those in violation of policy. • Promote and actively participate in OHA's 2030 goal of eliminating health inequities. • Hold awareness and be attentive to the direct and indirect accountabilities and opportunities within the Behavioral Health Division to positively impact and influence the goals, strategies, actions, and measures outlined in OHA's strategic plan (2024-2027). • Use language that promotes equity, engagement, asset-framing, and power-sharing; when crafting written content or correspondence, reference and adhere to equity-centered communication guidelines outlined in the ODHS/OHA Writing Style Guide.
20%	N	E	**Coordination of Fiscal Operations** • Provide fiscal input to CREU operational and implementation planning by translating proposed initiatives or process changes into cost impacts, funding needs, and feasible timelines for execution.

			• Identify CREU operational strengths/weaknesses across evaluator workflow supports and flag non-compliance with fiscal policies, rules or procedures; recommend corrective actions. • Monitor CREU financial records for accuracy and completeness; reconcile key data points and resolve discrepancies with program staff and partners. • Monitor invoicing and payments by validating invoice completeness and timeliness, resolving discrepancies, and coordinating approvals and processing to support uninterrupted service delivery. • Refine fiscal forms and procedures to standardize processing and reduce delays or rework. • Analyze fiscal impacts of compliance initiatives and operational changes across CREU partners to inform management decisions.
25%	N	E	**Fiscal Consultation** • Serves as a CREU fiscal advisor to behavioral health program managers, providing guidance on resource allocation and financial planning. • Identify and pursue funding sources for CREU from other government agencies to support evaluator workflow oversight, quality assurance activities, and required reporting. • Advise CREU leadership on administering Federal or other funds; align spending, documentation, and timelines to funding requirements. • Flag funding concerns early and recommend actions to keep CREU operations stable and compliant. • Forecast fiscal trends affecting CREU capacity and brief partners on implications and options. • Calculate the cost of CREU program proposals, including staffing, contracted evaluator services, training, data/reporting needs, and administrative overhead, when needed. • Train CREU staff and partners on budget and fiscal procedures to improve consistency, reduce errors, and speed processing.

			• Advise on grant application procedures supporting CREU priorities; strengthen budgets, narratives, and compliance alignment.
25%	N	E	**Budget Planning and Coordination** • Develops, monitors, and adjusts CREU program budgets supporting the statewide Aid and Assist (A&A) community restoration continuum, aligning allotment plans with legislative intent and approved limitations. • Prepares program-level budget requests, decision packages, and justifications tied to CREU operational needs such as, evaluation capacity, contract service levels, and required operational supports, translating program drivers into defensible fiscal narratives. • Monitors CREU fiscal practices for compliance with applicable state/federal requirements, grant provisions (when used), and agency procedures by identifying gaps, recommending corrective actions, and improving transaction and documentation processes. • Forecasts CREU financial requirements and spending patterns by analyzing revenue/expenditure trends and workload-related cost drivers, then recommending budget adjustments, reallocations, or contingency actions as conditions change. • Monitor CREU fiscal practices for compliance with applicable state/federal requirements, grant provisions (when used), and agency procedures by identifying gaps, recommending corrective actions, and improving transaction and documentation processes.
30%	N	E	**Fiscal Reporting** • Analyze CREU expenditures against projections for key A&A-related cost areas to monitor performance, compliance, and emerging pressures. • Produce and interpret complex fiscal reports for CREU leadership such as, status reports, expenditure reports, fiscal impact statements, quarterly/allotment views, ensuring data is reconciled to the accounting system and is decision-ready. • Identify trends, variances, and drivers in CREU spending and recommends corrective actions or operational

			adjustments when cost overruns, funding limits, or data quality issues are identified. • Resolve technical fiscal issues affecting CREU operations (coding/funding source questions, contract/payment processing problems, data mismatches between systems, and reporting anomalies), presenting alternatives and recommended actions. • Maintain and improves CREU fiscal tracking tools and databases by validating data accuracy, creating custom reports. • Coordinate across internal partners (finance, procurement/contracting, IT, and program teams) to resolve fiscal issues, improve reporting, and support smooth budget execution for CREU's A&A-related work. • Recommend solutions to streamline fiscal processes in support of community restoration efforts.

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.

The following are ongoing working conditions for the role:

- This position operates in a primarily remote office environment using a computer, phone, and videoconferencing platforms such as Teams or Zoom for most work tasks.
- In-person meetings or on-site work at OHA offices, courts, partner agencies, or community program locations may be required on an occasional basis.
- Travel within the state is occasionally required for meetings, hearings, presentations, collaboration with system partners, and engagement in statewide initiatives.
- Extended or irregular hours may be required, particularly during legislative sessions, public policy processes, and periods of high operational demand.
- Work requires prolonged periods of computer use, virtual meetings, and document review, occurring on a frequent to continuous basis. These tasks may involve ergonomic risks such as eyestrain, repetitive-motion injuries, or muscle strain; employees are expected to follow established ergonomic guidelines to reduce risk.
- Work also requires frequent communication with internal and external partners, which may include navigating complex or adversarial discussions involving sensitive legal, clinical, or operational issues. Emotional stress may occur occasionally due to the nature of the work, including balancing competing partner expectations, responding to urgent system needs, and making decisions that impact public safety, legal processes, and service outcomes.

- This position may occasionally encounter situations requiring rapid problem-solving or high-stakes decision-making under time pressure, particularly in response to court orders, emergent service gaps, or litigation-related issues.
- Travel by car or state vehicle presents occasional risk consistent with highway travel. Visits to partner locations such as jails, courts, hospitals, or community treatment settings may involve rare exposure to heightened security environments or individuals experiencing behavioral health crises; risks are mitigated by adherence to agency safety protocols and partner-site procedures.
- The position is expected to maintain confidentiality in accordance with HIPAA, state and federal law, and OHA policies. Compliance with all OSHA safety guidelines, agency workplace policies, and state ergonomic and remote-work requirements is mandatory.

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:

This position applies federal, state, and agency guidelines to ensure all policies, operations, evaluations, contracts, financial practices, and staff supervision activities comply with legal and regulatory requirements.

Federal guidelines are used to ensure that confidentiality, nondiscrimination, accessibility, safety, and privacy standards are fully integrated into program policies, evaluator practices, data systems, contracting decisions, and operational procedures.

- Occupational Safety and Health Act (OSH Act) – General Duty Clause & Ergonomics
- Health Insurance Portability and Accountability Act (HIPAA)
- Americans with Disabilities Act (ADA) & ADA Amendments Act
- Title VI of the Civil Rights Act of 1964
- Section 504 of the Rehabilitation Act of 1973
- 2 CFR Part 2 – Confidentiality of Substance Use Disorder Patient Records

Oregon Administrative Rules and Agency guidelines are used to guide program operations, evaluator certification and practice standards, clinical supervision requirements, procurement procedures, contract administration, and compliance monitoring across all program areas.

- OAR 125-246-0555 – Contract Administration; General Provisions
- OAR 291-026-0050 – Contract Administration — General Provisions
- OAR 125-247 – Public Procurement of Supplies and Services
- OAR 877-020-0012 – Requirements of Supervision for Clinical Social Work Associates
- OAR 833-130-0050 – Licensed Professional Counselors/MFT Associate Supervisor
- OAR 309-019-0125 – Staff Qualifications & Clinical Supervision
- OAR 309-090-0000 et seq. – Forensic Mental Health Evaluators and Evaluations
- OAR 309-090-0010 – Forensic Certification Types and Requirements
- OAR Chapter 309 Division 90 – Forensic Mental Health Evaluators and Evaluations:
- OAR Chapter 309 Division 88 – Placement of Defendants Who Lack Fitness to Proceed:
- OAR Chapter 309 Divisions 33 – Civil Commitment
- Temporary Administrative Order Chapter 309-033-0222 (Reflects HB 2005 statutory updates)

- DAS Oregon Procurement Manual
- DAS Oregon Accounting Manual
- ORS 279A – Public Contracting: General Provisions
- ORS 279B – Public Contracting: Public Procurements
- ORS 291.047 – Public contract approval by Attorney General; exemptions
- ORS 161.365 & ORS 161.370 (Aid and Assist / Community Restoration)

OHA policies are used to ensure that the program's daily operations, privacy practices, financial activities, workforce practices, and decision-making processes align with agencywide expectations, regulatory obligations, and organizational priorities.

- All OHA policy requirements
- OHA Forensic Evaluator Certification Program Guidelines

BHD policies are used to set program direction, establish operational standards, implement strategic priorities, and ensure that Aid and Assist and CREU services are delivered consistently, equitably, and in alignment with division leadership goals.

- All Division policy requirements

b. How are these guidelines used?

These guidelines are used to ensure all fiscal and business functions are transacted according to appropriate laws, rules, policies, and establishing priorities and procedures, and to establish parameters for carrying out the duties of this position.

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?
Forensic evaluators (contracted & certified)	Virtual meetings, email, phone; QA and consultation meetings	Connect fiscal trends to workflow drivers; validate assumptions and counts	Weekly
OHA internal divisions (Medicaid, Equity Office, OSH, Legal)	Virtual meetings, Teams, email	Ensure fiscal reporting aligns with statutes/court orders, reimbursement realities, and cross-continuum impacts	Weekly
Statewide policy and legislative staff (OHA, DOJ, Governor's Office)	Virtual meetings, email, briefings	Provide transparent fiscal reporting supporting statewide accountability	Monthly; weekly during session

DAS Procurement & Contracting	Email, virtual meetings, document routing	Support statewide budget processes; ensure forecast credibility	Monthly or as needed
OHA Financial Services & DAS Budget	Email, virtual meetings	Support statewide budget processes; ensure forecast credibility	Monthly; weekly during budget cycles
Information Systems (IS)/data teams	Virtual meetings, Teams, email	Implement integrated fiscal/operational reporting enhancements; improve data quality	Biweekly; as needed

SECTION 7. POSITION-RELATED DECISION MAKING

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

The following are examples of typical decisions the FA2 would make in this position:

- Always determine the impact of programs, policies, operations, budgets, and all other aspects of the program on health equity. Ensure decisions prioritize the equitable distribution or redistribution of resources and power and recognizing, reconciling, and rectifying historical and contemporary injustices.
- Select budget adjustments and reallocations (within approved limits) to address variances; directly affects whether CREU sustains Aid and Assist (A&A) service capacity without overspending.
- Identify budgetary data to gather in order to build CREU budget and financial systems.
- Approve/define forecast assumptions and expenditure trend drivers used in CREU planning; directly affects the accuracy and defensibility of funding needs and timing decisions.
- Determine corrective actions for non-compliance or process breakdowns (documentation, coding, approvals, transaction flow); directly reduces audit risk and prevents payment delays or misstatements.
- Decide which fiscal reports, metrics, and views to produce for leadership (frequency, level of detail, and key messages); directly affects decision speed and leadership's ability to intervene early.
- Resolve technical fiscal issues and choose the recommended path forward (e.g., funding source treatment, contract/payment processing options, system fixes); directly affects timeliness/accuracy of payments and the reliability of CREU financial data.
- Set data validation and reconciliation thresholds (what must be corrected, escalated, or can be monitored); directly affects confidence in CREU's reported financial position and reduces downstream rework.

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
BHPM3, A&A and CREU Manager	TBD	Meetings, email, text, phone, Teams and other virtual meeting and instant messaging platforms	As needed	Confirm accuracy, compliance, and timely delivery of required outputs

SECTION 9. OVERSIGHT FUNCTIONS *(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?

- ☐ 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.

- Demonstrated commitment to equity, cultural responsiveness, and community-based service approaches.
- Must maintain knowledge of Oregon statutes and administrative rules related to forensic behavioral health, public contracting, clinical supervision, and evaluator certification
- Must complete required OHA and DAS trainings related to procurement, contract administration, performance management.
- Demonstrated ability to communicate complex legal, clinical, and policy information clearly and persuasively with courts, behavioral health partners, contractors, and agency leadership.
- Skilled in producing high-quality written reports, policy documents, and legislative briefings.

- Ability to design and implement system improvements, evaluate service models, and apply creative approaches to operational and policy challenges.
- Skilled in using data and feedback to inform decisions and modernize processes.
- Ability to build collaborative, trust-centered relationships with courts, CMHPs, CCOs, Tribal governments, community providers, and justice system partners.
- Ability to translate policies into clear expectations and support staff through transitions and change.
- Knowledge of state budgeting practices, resource prioritization, and financial accountability.
- Experience making sound decisions that uphold legal requirements, protect public resources, and maintain program integrity.
- Knowledge of Oregon public contracting laws, procurement rules, and contract administration practices.
- Ability to manage complex contracts, ensure vendor compliance, and align resources with program goals and statutory mandates.

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
Minnie McCloud-Walker LI Minnie McCloud-Walker LI (Jul 6, 2026 11:24:56 PDT) Appointing Authority Signature	Jul 6, 2026 Date