



**STATE OF OREGON
POSITION DESCRIPTION**

**Position Revised Date:
10/16/2025**

This position is:

- ☐ Classified
☒ Unclassified
☐ Executive Service
☐ Mgmt Svc – Supervisory
☐ Mgmt Svc – Managerial
☐ Mgmt Svc - Confidential

Agency: Oregon Health Authority/Health Policy & Analytics

Facility: Public Employees' Benefit Board (PEBB) & Oregon Educators Benefit Board (OEBB)

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title:	Fiscal Analyst 1	b. Classification No:	C1243
c. Effective Date:	10/16/2025	d. Position No:	0502121
e. Working Title:	PEBB OEBB Fiscal Analyst	f. Agency No:	44300
g. Section Title:	PEBB OEBB Fiscal Services	h. Budget Auth No:	
i. Employee Name:	Vacant	j. Repr. Code:	UA
k. Work Location (City – County):	Remote - Salem - Marion		
l. Supervisor Name (Optional):			
m. Position:	<input checked="" type="checkbox"/> Permanent <input checked="" type="checkbox"/> Full-Time	<input type="checkbox"/> Seasonal <input type="checkbox"/> Part-Time	<input type="checkbox"/> Limited Duration <input type="checkbox"/> Intermittent <input type="checkbox"/> Academic Year <input type="checkbox"/> Job Share
n. FLSA:	<input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt	If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Professional <input type="checkbox"/> Administrative	o. Eligible for Overtime: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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 Public Employees' Benefit Board's (PEBB) and Oregon Educators Benefits Board (OEBB) missions are to provide high quality medical, dental and other benefit plans for members at a cost that is affordable to both the employer and employees through the design, purchase and administration of medical, dental and voluntary benefit plans. PEBB and OEBB contract on behalf of approximately 97,000 school district, ESD, charter school, community college, agency, university, and semi-independent agency active employees, self-pay members, pre-Medicare eligible retirees and COBRA participants and their 160,000 dependents.

- 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 the Fiscal Analyst I position is to ensure fiscal processes related to budget execution, cash management, invoicing and reconciliation of eligibility to payments are performed according to internal controls and are practiced with program integrity. This position tracks, organizes and reconciles financial data required for managing the daily fiduciary responsibilities of the Oregon Educators Benefit Board (OEBB). This position serves as a "back-up" for the PEBB Fiscal Analyst and engages in joint PEBB and OEBB fiscal activities. This position oversees all aspects of the

monthly premium billing, reconciliation and pass-through of over 200 educational entities and over 1,800 “self-pay” members. The position is responsible for completing the PEBB and OEGB quarterly allotment plans and assists the Financial Coordinator in maintaining expenditure tracking models and cash flow models for benefit programs administered by PEBB and OEGB. The position provides project support, fiscal data research and analysis and interacts with external partners to ensure compliance with applicable rules, regulations and legal requirements. The position uses databases extensively to maintain active financial data repositories and building queries for the purpose of reporting complex fiscal information. The position works as a liaison with educational entities and the insurance plans to ensure an accurate pass-through of premiums match eligibility for benefits.

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
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.			
50%	N	E	<ul style="list-style-type: none"> • Prepare monthly premium invoices for educational entities and self-pay members who OEGB administers benefits for. • Ensure premium payments and reimbursements to insurance carriers are in compliance with all contract provisions. • Ensure accuracy and timeliness by implementing efficient processes and procedures that are compliant with state and federal regulations. • Utilize State Treasury applications for cash management. • Reconcile premiums due to Carriers vs. premiums received from Entities. Research all discrepancies and resolve billing and enrollment discrepancies. • Recommend and/or prepare adjustments to the MyOEGB Benefits System based on Carrier reconciliation findings. • Provide Customer Service to Entity Payroll staff and OEGB administered self-pay members. • Work with MyOEGB System Programmers, to update/change current reports or processes and implement future reports and processes. Test all new and updated report and processes to ensure information is accurately reflected.

30%	N	E	<ul style="list-style-type: none"> Analyze, interpret, and organize financial data such as revenues and expenditures from multiple data sources and develop methods to track, project and reconcile for reporting and managing OEBC Budget and fiscal information. On an independent basis, perform expenditure, revenue and enrollment trending analysis and make recommendations to the Financial Coordinator when appropriate. Utilize specialized spreadsheets, and data repositories for monitoring expenditures, researching emergent issues and proposing solutions and opportunities. Utilize the Oracle reporting tool, and Treasury Cash Management reports, to analyze and reconcile financial accounts on a monthly basis. Identify discrepancies, irregularities and research and report on findings. Seek alternative solutions with appropriate internal and external partners and participate in focus groups charged with solving problems, improving systems, processes, policies or procedures.
15%	N	E	<ul style="list-style-type: none"> Prepare allotment plans for PEBB and OEBC on a monthly basis. Perform back-up duties for the PEBB Fiscal Analyst and engage in shared activities that involve both PEBB and OEBC.
5%	N	NE	Other reasonable duties as assigned.

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.

Duties of this position are usually performed in an office environment. Must be able to work under pressure, manage multiple priorities and meet deadlines. The person in this position must possess excellent prioritization and organizational skills as this position requires the ability to work on multiple tasks simultaneously, sometimes within short time frames.

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;
- Administrative Rules;
- Division and Department policies;
- Collective Bargaining Agreements;
- State Treasurer Cash Management Policies;

- State Budget Instructions;
- National Automated Clearing House Association (NACHA);
- Oregon Accounting Manual (OAM);
- Generally Accepted Accounting Principles (GAAP);
- Government Accounting Standards (GASB);
- SFMS Manuals; and
- State and federal guidelines and mandates

b. How are these guidelines used?

As reference documents to ensure procedures are correct and as source documents for research and data gathering. These guidelines provide general and specific direction in performing job duties.

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

Vendors and Carriers	Phone/Person/E-mail	Give directions and resolve issues	Daily
Entities and OEBC Administered Members	Phone/Person/E-mail	Billing, collection and other inquiries	Daily
OEBC fiscal staff	Person/E-mail	Collaborate on processes and procedures	Daily
DHS accounting staff	Phone/Person/E-mail	Give direction and resolve issues	Weekly
OHA fiscal staff	Phone/Person/E-mail	Give direction and resolve issues	Weekly
State Treasury	Phone/Person/E-mail	Respond to inquiries	As needed
DAS	Phone/Person/E-mail	Respond to inquiries	As needed
Third Party Administrators	Phone/Person/E-mail	Respond to inquiries	As needed
Consultants	Phone/Person/E-mail	Give direction, resolve issues and respond to inquiries	As needed

SECTION 7. POSITION RELATED DECISION MAKING

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

Decisions are made within parameters established by law, rules, policy and procedures. The position exercises judgment in providing interpretation and administration of agency policy and resolving day to day problems related to overall financial functions of OEBC. Decisions may impact whether OEBC is in compliance with state and federal reporting guidelines and regulations. Decisions impact risk management and division image among a statewide customer base. Employee participates in decision making relating to development of policies and procedures within a team environment. Incorrect decisions can negatively impact educational entities, OEBC partners and OEBC providers.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
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Note: Work is reviewed by the Financial Coordinator (Position No. 0770063) and Director of Operations is responsible for direct supervision.

Financial Coordinator	0512452	In person & written material	Daily as-needed	Accuracy of work product, project planning, daily performance and tasks.
PEBB/OEBB Director	0770121	In person & through e-mail	As needed	Reviews and direct supervision.

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:

Requires a good understanding of generally accepted accounting principles and basics of governmental fund accounting and public budgeting. Requires previous fiscal analysis and budget experience, working knowledge of SFMA and Brio and a moderately high proficiency in Excel, Word or other comparable spreadsheet and word processing software tools. Basic to intermediate knowledge of the methods and techniques of program analysis and review. Intermediate skill level in preparing written reports and

evaluating facts in relation to rules, regulations and policies. Ability to manage multiple tasks. Must have a valid Oregon driver's license.

This position is responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts; contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. Working in a team oriented environment requires participative decision making and cooperative interactions among staff and management. Be aware of Affirmative Action and the department's diversity strategies and goals.

Criminal History Check:

This position is subject to a criminal records check, which may require fingerprints. If an offer of employment is made, the offer will be contingent upon the outcome of a criminal records check (FBI and/or LEDS). Any history of criminal activity will be reviewed and could result in the withdrawal of the offer or termination of employment.

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".		
N/A		

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, and employee name and position number.

SECTION 12. SIGNATURES

Employee Signature

Date

Supervisor Signature

Date

Appointing Authority
Signature

Date