



TAX BOARD BULLETIN

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June 2006

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Message from the Board Chair

- Merry VanAtta -

Should Technology be added as a general subject matter to the list of acceptable continuing education programs? I believe it should. Our profession is moving into new territory with paperless offices and mandatory e-filing, yet, as our rules stand now, unless a licensee can demonstrate a direct relationship to the preparation of a client's income tax return, instruction in the area of Technology doesn't qualify as continuing education. Do you know how to password protect your computer files? Do you know how to stop hackers and viruses? Do you know the best back-up system and plan? Do you know how to evaluate electronic file cabinet systems? If you take courses to educate yourself in any of these areas, these courses will not qualify for CE.

You, the licensee, can change this. Right now the members of the Board come from both extremes on the issue of what should qualify for CE, all the way from allowing any course that will enhance professional knowledge to allowing only courses in personal income tax preparation and ethics. The members of the Board are not going to act unless they are directed to act by the licensees.

You can direct the Board to include Technology as a general subject matter for acceptable continuing education by simply telling them it is time to acknowledge that as professionals we need that expertise. Conversely, if you think this is an area that should remain unacceptable for CE, you need to tell them that too.

The Board has asked for input from the licensees before and there has been very little response. I want you to SHOUT to the Board this time. A simple e-mail or letter will do and it doesn't have to be long or detailed, just a simple YES I think Technology courses should be acceptable CE or NO I don't think Technology courses should be acceptable CE. That's all it takes. Two minutes or less of your time but remember, you are going to have to SHOUT to be heard. When hundreds of licensees respond to this request, the Board will listen.

The Board will be addressing Technology courses at their September 13, 2006, board meeting. Please, as soon as you receive this newsletter, respond by taking the two minutes to let your voice be heard. E-mail the Board at tax.bd@state.or.us or mail your response to 3218 Pringle Rd SE #120, Salem, OR 97302. Remember only two minutes of your time. JUST DO IT!

Board of Tax Practitioners

3218 SE Pringle Road #120, Salem, Oregon 97302

2006/2007 Annual Calendar

All meetings are open to the public unless otherwise stated. The Tax Board encourages interested licensees to attend any public meeting. Your input is appreciated!

Meeting notices and agendas are located on the Tax Board website www.oregon.gov/OTPB approximately two weeks prior to the scheduled meeting date. Map and directions to the Board of Tax Practitioners office, which is located in the Morrow Crane Building is available via our website. If notices and agendas have not been posted, please e-mail the Board office at tax.bd@state.or.us to find out when they will be posted.

Pursuant to ORS 192.660(1), Executive Sessions are closed to members of the public.

Month / Time	Topic	Location	Comments
January 19 th & 20 th "2006" 9:00 a.m.	Board & Committee Meetings	Salem Morrow Crane Building	Public Welcome
May 9 th & 10 th <hr/> May 11 th & 12 th 9:00 a.m.	Work Sessions <hr/> Board & Committee Meetings	Salem Morrow Crane Building	Executive Session <hr/> Public Welcome
July 11 th & 12 th <hr/> July 13 th & 14 th 9:00 a.m.	Work Sessions <hr/> Board & Committee Meetings	Salem Morrow Crane Building	Executive Session <hr/> Public Welcome
September 12 th & 13 th <hr/> September 11 th 9:00 a.m.	Board & Committee Meetings <hr/> Instructor Workshop	Salem Morrow Crane Building <hr/> Winema Place – #50 4061 Winema Place NE	Public Welcome <hr/> Must register to attend
November 6 th & 7 th Outreach Meeting <hr/> November 6, 2006 Licensee Luncheon 9:00 a.m.	Board & Committee Meetings	Newport <hr/> Hallmark Resort 744 SW Elizabeth St Newport OR 97365	Public Welcome
December 9 th 9:30 a.m.	Board Administered Examination	Winema Place NW Center Building 50 4061 Winema Place NE Salem, Oregon	Space availability to be announced. Application deadline: November 8, 2006.
January 8 th & 9 th "2007" 9:00 a.m.	Board & Committee Meetings	Salem Morrow Crane Building	Public Welcome

* **Refer to Meeting Notice for the time and location.**

** **Locations are subject to change do to the availability of the Morrow Crane conference room and circumstances out of the Board's control.**

Message from the Director

The agency is currently devising the 2007-2009 biennial budget. Unfortunately, this budget will include a fee increase. On June 6, I sent an email to all the licensees discussing the fee increase and the need for it. The memo included specifics on the fee increase and the specific areas the increased revenue would be used. I also encourage everyone to send me comments on the increase, as well as, any concerns they had. I appreciated everyone's comments I received. All of these comments will be reviewed by the Board.

The agency continues to evolve and look for better ways to serve its customers. Soon you will be sent a customer service survey requesting your opinion of the agency's service to you. When you receive the survey, please take a moment to complete it. The information will be helpful for us to meet your future expectations. The agency values your input. The results of the survey will be used to help create the agency's strategic plan. The survey will only take a moment to complete, but the information you provide is extremely valuable. Thank you in advance for your participation.

I want to take a moment to encourage everyone to keep your email address up-to-date at the agency. We have created a serve list with these email addresses. This list allows us to send one email to all the licensees at one time. This allows the agency to get valuable information immediately out to you. For your protection, any message sent from the agency will be preceded in the title by BTP. In other words, if you see an email from the agency, in the title will be BTP. If you do not see BTP, the message was not from this agency. This will prevent you from opening emails that are not from the agency.

The Board continues to change. Gerald Zielinski retired from the Board after six years of service, which included a year as Board Chair. Gerald work tirelessly as the Board's Complaint Committee Chair. He was instrumental in developing the Board's penalty matrix, used to assess civil penalties. I want to encourage everyone to thank Gerald for his years of service to the Board. Wendy Jones filled the position Gerald vacated. A new public member, Robert Elliott, has also joined the Board. His first meeting will be in July.

I again want to encourage everyone to view the agency's website, www.Oregon.Gov/OTPB on a regular basis. The agency lists all its activities on the website and posts alerts for upcoming events. The website is your connection for board meeting materials. These include examination statistics, compliance information, meeting minutes and other materials used at the Board meetings. These materials will be available before each board meeting. The website is also the place to view all the approved correspondence courses. If you are looking for Board approved education, it is listed on the website. The information needed to contact the sponsor is also included.

Paid Ads in the Board Bulletin...

If you would like to place an advertisement, either for help-wanted, or something else related to the tax field in the board bulletin, we welcome the opportunity to serve you. Below is a list of the fee schedule:

- \$10 per 3-3/8 inch line or part line of copy
- \$50 for a business card size ad
- \$100 for a quarter-page ad
- \$180 for a half-page ad
- \$350 for a full page ad

If you have any questions and/or would like to place an advertisement in the next board bulletin, give us a call at 503-378-4034, or e-mail us at tax.bd@state.or.us.

Message from the Investigator

Once again this year has seen a number of investigations involving unlicensed activity. The number of complaints has also increased and they involve several cities throughout Oregon. I have been successful in stopping this unlicensed activity due to the continued help from both licensee's and the consumers. Emailing licensees requesting help with my investigations has produced information to resolve complaints.

I encourage licensees to continue to contact me with concerns regarding both licensed and unlicensed activity. While addressing return of records issues that were brought to the Boards attention I am pleased with the cooperation from licensees in working to resolve this issue. To review a list of disciplinary actions you can go to the following URL:

http://www.oregon.gov/OTPB/Disciplinary_Actions.shtml

Two businesses disclosed confidential information without the consent of the client. The disclosure was inadvertent and steps were taken to reduce the risks to the consumer. These incidents illustrate the importance to review how confidential information is stored and disposed of to avoid disclosure. I would advise everyone to write an office procedure concerning the storage and disposal of confidential information. I would also make sure your staff is trained on the procedure. In both these investigations I am pleased to report that there was no evidence of harm to the consumer.

The agency has received inquiries on "Out Sourcing" the preparation of personal income tax returns to businesses located outside of Oregon. Oregon's laws and rules prohibit the out sourcing of the preparation of personal income tax returns by Licensed Tax Consultants and Licensed Tax Preparers, even though this activity may be allowed in other states.

The 2005 Legislation created requirements when offering Refund Anticipation Loans. Statutes now require the loans to be facilitated by a Licensed Tax Consultant, or a Licensed Tax Preparer. It also requires disclosure of information on the loan. These new requirements can be found in the Oregon Revised Statutes under ORS 673.615(3). I encourage anyone who is offering this service to their clients to review ORS 673.615(3).

I have had the opportunity to speak with some of the associations at their monthly chapter meetings regarding the "Professional Code of Conduct". These opportunities gave me a chance to answer questions and address licensee concerns. It is important to review the laws and rules. To obtain a copy of the Oregon Revised Statutes and Oregon Administrative Rules you can go to our web page and download a copy: <http://www.oregon.gov/OTPB/Forms.shtml>.

I am sending out a customer service survey to obtain feed back from licensees and consumers that have contacted the Board about possible compliance issues. Please take the time to complete the survey. The information will help improve the agency's response to complaints.

Web Update...

Licensees are encouraged to check the Boards website frequently for any changes: www.oregon.gov/OTPB

If you have any comments and/or would like to see additional information listed on the site, please contact the board office by phone at: (503) 378-4034 or e-mail your inquiry to: tax.bd@state.or.us.

The Board welcomes your input in the continuous development of the web site.

**We are looking for an Accountant, CPA or
Licensed Tax Consultant**

for the upcoming 2006/7 tax season.

Work for one of the highest paying firms nationally, with over 300 offices nationwide. Earn \$50.00/per hour and up to \$500/per day with 100% payout. Must have experience in personal income tax preparation, do quality work, current state licensure required and will be responsible for overseeing office tax preparation

PT/FT available. Fax Resume to 503-624-1855 or e-mail to
Advisor@swansontaxgroup.com



Swanson Tax Advisory Group
“Americans #1 Tax & Retirement Planning Business”

Serve List Update

The board office is currently utilizing a newly developed serve list to update licensees of any current events to information or items that may affect industry practices. The serve list allows the agency to communicate with licensees that have supplied their e-mail addresses to the board office.

It is very important to supply and register your current e-mail address with the board office so that you will be notified of any pertinent information. To register your current e-mail address, please go to the following Internet link and you will be directed to the forms page of the Board's website: <http://egov.oregon.gov/OTPB/Forms.shtml> . You will need to download the Address Change Form and either fax or mail the completed form to the board office.

If you do not have an e-mail address, please contact the board office so that your license file can be properly updated. You can contact the board office by mail at: 3218 SE Pringle Road #120, Salem, Oregon 97302 or by phone at: (503) 378-4034.

The implementation of this serve list is a step forward for the Board in providing quality customer service to our licensee's and constituents. The serve list is used to send; press releases, recruit volunteers for committee service, rulemaking updates/schedules, notice of proposed hearings as well as permanent rule changes among many other important updates.

So, please provide your e-mail address to ensure you will receive the latest information & updates.

2006 Board Administered Examination

Scheduled for: Saturday, **December 9th**

Where: Winema Place -NW Center
Chemeketa Community College
4061 Winema Place N.E. Bldg #50
Salem, Oregon 97305

Sign-In Time: 9:30 am through 10:30 am

Instructions: 10:30 am through 11:00 am

Examination Begin Time: 11:00 am

Please Note: Exams will be based on **2005** tax law.

Space available at the examination site is limited to 250 candidates. The first 250 individuals to make application and qualify for the examination will be granted a seat at the **December 9, 2006**, board administered examination. Candidates wishing to take the board examination at the above listed location are required to submit all application materials and fees to the board office no later than: **5:00 p.m. - November 8, 2006.**

Photo Identification will be required at the time of sign-in. Only simple function calculators will be allowed - programmable/tape feed calculators are prohibited. All items brought to the examination must be placed in clear/see through containers and must be revealed to and approved by staff at the time of sign-in. No **solid** food items, purses, cell phones or other un-approved electronic devices will be allowed in the examination room(s) and during the examination. Liquid food items such as; water, soda and/or protein drinks are acceptable.

Examination Duration:

Preparer & Consultant Exams = 5 hours

Consultant State Only Examination = 1.5 hours

The Board encourages all examination applicants to gain a copy of the General Information Booklet which is designed to assist candidates in studying and applying for the examination as well as provides candidates with insight on the outlay of the examinations, including a practice test. The updated General Information Booklets will be released on September 1, 2006, and can be obtained from our website at: www.oregon.gov/OTPB

For additional information, questions regarding the board examination and/or to obtain application materials please visit our website at:

www.oregon.gov/OTPB

Proposed Rule Changes & Rulemaking Schedules...

A Rule Hearing was held on June 29, 2006, for proposed rules pertaining to OAR 800-025-0040; Designated Consultants. The proposed amendments were requested by the Rules Advisory Committee, during their last review of chapter 800, to make wording consistent between regulations required for designated and resident consultants as well as for general "housekeeping" and "maintenance".

Details regarding the proposed adoption and amendment of these OARs can be viewed via the following URL:

http://egov.oregon.gov/OTPB/oregon_administrative_rulemaking.shtml

As with all proposed changes to the OARs a hearing date and request for public comment period was established. The hearing took place on **June 29, 2006, at 9:00 a.m.** Last day/time for public comment, whether written or via testimony at the hearing, was **June 29, 2006, 5:00 p.m.**

Licensees are encouraged to provide public comment and to check the Boards website **frequently** for updates on any proposed OAR changes: www.oregon.gov/OTPB

Paid Advertisement:

TAX AND ACCOUNTING FIRM

is seeking LTP/LTC with Quickbooks and Payroll experience.

Year Round position.
\$17 hr.

Submit cover letter and resume to

EMPLOYMENT OPPORTUNITY

PMB# 104

822 NW Murray Blvd.

Portland OR 97229-5868

2006 Instructor Workshop

The Board is again providing you with another great Instructor's Workshop.

Date: Monday, September 11, 2006

Time: 9:00 am – 5:00 pm (*includes 1.5 hours for lunch*)

Location: Winema Place, 4061 Winema Place N.E.

– Building #50, Salem, OR

Cost: No Cost but Lunch is on your own.

The Board would like to invite all Instructors: Basic, Consultant, and Seminar Instructors to attend this one day seminar. This is an opportunity for you to come and talk to the board members and get feed back about the Board of Tax Practitioner Examinations. The workshop will provide valuable information to help you prepare to teach the basic 80-hour course as well as consultant's courses and seminars.

The workshop will include: A presentation facilitated by Joy Wilen of Wilen & Associates; an in-depth and interactive review and discussion of a preparer examination and a panel discussion with the Board. Access the home page of our website frequently to gain additional and up-to-date information regarding the instructor workshop: www.oregon.gov/OTPB

So, plan to come; we have great speakers, great topics and there is no cost for this workshop.

Teal License Certificates...

If you're a licensed tax consultant (LTC), you may have already received your new 2006 license certificate. As license colors are rotated annually, this year, consultant and preparer licenses will be printed with a **teal** background color to show a differentiation from last year's license.

Paid Advertisement:

**Place Your Paid
Advertisement Here!!!**

BOARD MEMBERS Their Terms of Office & Committees in which they serve

Merry VanAtta

Chair, Lebanon

6/01/03 - 5/31/06

6/1/06 – 5/31/09

Committees:

Administration (C) - Complaint

Marilyn Johnston

Vice Chair, Central Point

2/01/04 - 1/31/07

Committees:

Administration - Exam & Education

Donna Gilmour

Salem

6/01/02 - 5/31/05

6/01/05-5/31/08

Committee:

Complaint – Exam & Education (C)

D. Sue Church

Bandon

12/01/00 - 11/30/03

12/01/03 - 11/30/06

Committees:

Administration - Business Practice (C)

Michael Addington

Bend

3/31/05 - 3/30/08

Committees:

Complaint (C)

Wendy M. Jones

Sunriver

4/10/06 - 4/09/09

Committees:

Business Practice – Exam & Education

Robert G. Elliott

Lebanon

7/01/06 – 6/30/06

Committees:

Business Practice

BOARD MEMBER NEWS

Changes on the Board

They're off---They're on-----Who's on first?

We have had several changes to Board personnel since our last Tax Board Newsletter. Gerald (Jerry) Zielinski retired after the January board meeting and his six years of service were recognized at the May meeting with a nice commemorative plaque, gifts from other board members as well as staff and a "CAKE".

Welcomed at that May meeting was Wendy Jones, our newest member, whose bio is soon to be on the web. Wendy jumped right in and participated in the committee and board meetings.

Robert Elliott, our newly appointed public member, will be sworn-in at our July meeting. We welcome our new public member and look forward to having a full seven member Board again.

About Our New Board Member ~Wendy M. Jones~

Wendy, a native Oregonian, was raised in the North and South Santiam areas, and headed over the mountains to the sunshine in Central Oregon in the early 1970s. After living on the Warm Springs Reservation for a while, where she met her life partner, she migrated south to Sunriver. Originally educated in the nursing field, she was a LPN and Paramedic, as well as teaching EMT 1 classes at Central Oregon Community College. In the mid 80's she chose to shift gears and started a tax consulting career. She currently practices in Sunriver and Bend under the name of Moore Enterprises, Inc. as a Licensed Consultant and Enrolled Agent. She is an active member of OSTC and OAIA, and enjoys teaching occasional seminars. During the off season for taxes, she focuses more on the landscaping business she and her husband Kim have had for over 30 years. As a Certified Arborist, she consults for developments and homeowners. They live in the home south of Sunriver where they raised their two girls, Nandy and Braylene. Passions include reading, Reiki, flower essence, aromatherapy, and Welsh terriers.

Outgoing Chair ~Donna Gilmour~

As outgoing board chair I want to take this opportunity to thank all board members and staff for making the last two years a "Piece of Cake". We went through the legislative process in 2005 with flying colors thanks to Ron Bersin's sharp pencil and excellent political know how.

Board members worked through controversial issues as a strong team. The past two years has left me with a good feeling of your State Board in action.

Your new chair, Merry VanAtta, served last year as vice-chair. She has organizational skills that will continue this teamwork and momentum that the board has enjoyed. We welcome your leadership, Merry.

November Board Opening

The Board of Tax Practitioners would like to inform all constituents there will be an opening on the board in November. The board member opening is as follows:

- Licensed Tax Consultant – To qualify for this position on the Board per ORS 673725(3)(a), you must be a currently licensed tax consultant and have been engaged in the preparation of personal income tax returns for valuable consideration for no less than five years.

The Board meets approximately 17 days per year. Board members are paid expenses, including meals, mileage and lodging, plus a \$30 stipend for each day worked. Each term is for three years with a maximum of three terms served.

To download an application form please enter the following internet URL and you will be directed to the application form on the Governor's Office website:

<http://governor.oregon.gov/Gov/pdf/forms/Interestform.doc>

Lapsed ~vs~ Inactive Licensure

With consultant renewals underway and preparer renewals approaching, we felt it might be helpful for licensees contemplating whether to renew their license, go inactive or become lapsed, to explain what the difference is between placing your license into an **inactive** status **OR** allowing your license to go into **lapsed** status.

Inactive

Inactive status is when a licensee chooses not to work in the capacity of a tax preparer or tax consultant for a period of time – over one year but not to exceed three years. The fee for putting a license in inactive status is \$35 for preparers and \$50 for consultants. However, thirty (30) hours of continuing education for each renewal period will still be required upon license renewal.

The benefit for licensees who are considering inactive status might be that a licensee has had an emergency and was unable to complete their continuing education but they want to renew their license at a later date. If this or any other situation occurs the licensee may pay the \$35 preparer or the \$50 consultant inactive fee upon each renewal period. Once the licensee chooses to renew their license, all they need to do is submit the \$65 preparer license fee or the \$75 consultant license fee along with the required continuing education.

If a licensee allows their license to go into inactive status for over three years the licensing process will begin over. This means that, all consultants or preparers who are over the three year mark would have to qualify to take the exam and meet the minimum qualifications for licensure.

Lapsed

A licensee may go into lapsed status for up to three years. There is no fee for allowing a license to go into lapsed status. However, if a licensee decides to become licensed within the next three years, they will be required to pay each year's licensing fee plus a late fee and submit the required amount of continuing education for each year in lapsed status.

A licensee who allows their license to go into lapsed status **cannot**, at a later date, go into inactive status.

If you have any questions regarding your license renewal please contact, Karla Siclait, Licensing Specialist, at: (503) 378-4034.

We hope this information assists you in making positive decisions in the upcoming tax seasons.

Licensee Update

Marvin Carlson has been seen for years, as tax organizations liaison and on his own, at the IRS, the Oregon Department of Revenue, and the Board of Tax Practitioner meetings. His absence in the last year was very apparent to those of us who were use to seeing him. Marvin has been battling cancer and diabetic illnesses. He attended the IRS Tax Practitioner Liaison meeting in May, and stated his health was much better and we would be seeing him again in the near future. He seems to have won that life-threatening battle and is on the way to recovery. The Board looks forward to seeing Marvin again.

Marvin has been honored in the last year by both the Oregon Society of Tax Consultants (OSTC) and by the Oregon Society of Enrolled Agents (OrSEA). He was awarded the Bill Cochran award in September 2005 at the OSTC Convention. Unfortunately, Marvin was too ill to accept his award in person. Marvin had been on OSTC's State governing board and President of the Columbia Rivers Unit for over 15 years. During that time he was liaison with the government agencies and was responsible for the OSTC Convention in Portland. He has acted for several years as representative to the IRS Symposium, helping set up the seminar that is given each Fall in the Portland area. Marvin became active in OrSEA about six years ago. He became a government agency liaison for them, and then became a very active Board member. OrSEA honored Marvin at their Convention in Newport this May. Unfortunately, again, Marvin was unable to attend.

Board Meeting Information

Since the Board feels that it is important for all practitioners to stay current with matters that may affect the ability to practice, cost of licensing, and possible legislative impact, another avenue has been opened for communication.

In an ongoing effort to keep practitioners current regarding board matters, the State Board has made an exemption to the practice of charging for all copies of the board meeting information. Members consistently attend the meetings representing the primary associations that serve this profession, and these groups will be entitled to a copy of the Board packet at each meeting. Prior to the Board meeting, the associations, OSTC, OATC, OAIA, and ORSEA, must provide a designated representative to the Board for whom a copy of the information will be held at the office the day of the meetings. Each association may let the Board know if the representative cannot attend, and may request that the packet be given to a specific alternate.

We would like to encourage all practitioners to attend the Board Meetings, yet if you are unable, you can stay current by checking the Board website and through your association. Most of the associations have local chapters with regular meetings. Continuing education is often included, so please contact them to find out if their meetings are open to non members. There may be a nominal fee for education provided during the meetings, and it offers time to network with your peers. Several even serve refreshments!

Non-accepted Continuing Education (Seminars):

This list is NOT a complete list of non-accepted courses – It has been established only as a guide to assist licensees in choosing acceptable continuing education courses.

Sponsor Name	Course Title	Hours
Drake Software	2005 Drake Software Update Schools	11
Edward Jones	Understanding Insurance Basics	3
Intuit, Inc.	DMS: "Less Paper" Webinar	2
Intuit, Inc.	Lacerte: Annual Update Seminar in Eugene, OR	4
Intuit, Inc.	Lacerte: Annual Update Seminar in Portland, OR	4
Michael A Gordon CPA, LLC	Checkpoint Training	2
Michael A Gordon CPA, LLC	Living Colors	3
NAEA	Voluntary Collections	4
NAEA	Enforced Collections	4
National Society of Tax Professionals	Annual Federal Tax Update & Review Course	8
Thompson PPC DBA Gear-up	Technology	4

Non-approved Continuing Education (Correspondence/Self-Study):

All Sponsors are currently in renewal status – Please refer to the website for updates on the list of 2006/2007 approved correspondence courses: http://www.oregon.gov/OTPB/Approved_Corresp_Courses.shtml

Newsletter Schedule

Newsletters will be prepared and released annually on the following dates:

June 30th

October 31st

If you would like to see articles concerning certain topics and/or updates included within our newsletter please contact the board office at (503) 378-4034.

EXAMINATION PASS RATES

Exams Taken Between 10/1/2005 and 5/31/2006

Includes College Proctored and Board Administered Examinations

Overall

Exam Part	# Took Exam	Passed	Failed	Pass Rate
Preparer	814	346	463	43%
Consultant	266	60	202	23%
Consultant State Only	31	22	9	71%

First Timers

Exam Part	# Took Exam	Passed	Failed	Pass Rate
Preparer	517	260	257	50%
Consultant	168	44	124	26%
Consultant State Only	24	17	7	71%

Retakes

Exam Part	# Took Exam	Passed	Failed	Pass Rate
Preparer	292	86	206	29%
Consultant	94	16	78	17%
Consultant State Only	7	5	2	71%

EXAMINATION HIGH SCORES

Exams Taken Between 10/1/2005 and 2/28/2006

Includes College Proctored and Board Administered Examinations

October Examinations	# Took Exam	Over 80%	High Score
Preparer	5	0	76
Consultant	11	0	76
Consultant State Only	5	3	80
November Examinations	# Took Exam	Over 80%	High Score
Preparer	15	2	83
Consultant	35	6	88
Consultant State Only	6	2	88
December Examinations	# Took Exam	Over 80%	High Score
Preparer	520	166	96
Consultant	101	12	91
Consultant State Only	10	6	95
January Examinations	# Took Exam	Over 80%	High Score
Preparer	151	15	88
Consultant	67	4	83
Consultant State Only	4	3	83
February Examinations	# Took Exam	Over 80%	High Score
Preparer	72	6	87
Consultant	25	1	82
Consultant State Only	1	0	58

FOR:

INSTRUCTOR PASS RATES – PREPARER EXAMS

March 1, 2005 through February 28, 2006

Please refer to the examination information portion of our website at:

<http://www.oregon.gov/OTPB/Examinations.shtml>

BOARD OF TAX PRACTITIONERS

CUSTOMER SATISFACTION SURVEY

The Board of Tax Practitioners (Tax Board) would like you to take the time to fill out the brief survey provided below. This survey should take less than three (3) minutes of your time.

The purpose of this survey is to increase licensee and consumer satisfaction each time they have contact with the Tax Board or if service provided from the Tax Board is satisfactory. Your input will assist us in continuing to provide exceptional service to our licensees and consumers.

Instructions: Please check one box under each question that best describes your experience with the Tax Board.

It is not necessary to provide the Tax Board with any personal information. All responses will be confidential.

- 1) How do you rate the timeliness of the services provided by the Board of Tax Practitioners?
 Excellent Good Fair Poor Don't Know
- 2) How do you rate the overall ability of the Board of Tax Practitioners to provide services correctly the first time?
 Excellent Good Fair Poor Don't Know
- 3) How do you rate the helpfulness of the Board of Tax Practitioners' employees?
 Excellent Good Fair Poor Don't Know
- 4) How do you rate the knowledge and expertise of the Board of Tax Practitioners' employees?
 Excellent Good Fair Poor Don't Know
- 5) How do you rate the availability of information at the Board of Tax Practitioners?
 Excellent Good Fair Poor Don't Know
- 6) How do you rate the overall quality of service provided by the Board of Tax Practitioners?
 Excellent Good Fair Poor Don't Know
- 7) How do you rate the content of the information provided by the Board of Tax Practitioners?
 Excellent Good Fair Poor Don't Know
- 8) How do you rate the Board of Tax Practitioners website? "www.oregon.gov/OTPB"
 Excellent Good Fair Poor Don't Know
- 9) What area within in the Board of Tax Practitioners did you receive your most recent service?
 Licensing Examinations Complaint

The Tax Board appreciates the time you took filling out this survey. Your input in this survey will ensure that the Tax Board continues to be responsive to the licensees and consumers served.

PLEASE MAIL OR FAX YOUR CUSTOMER SATISFACTION SURVEY TO:

Board of Tax Practitioners
3218 Pringle Rd SE #120
Salem OR 97301
Fax: (503) 378-3575

**THE BOARD OF TAX PRACTITIONERS WORKS TO PROTECT CONSUMERS BY INSURING
THAT OREGON TAX PROFESSIONALS ARE COMPETENT AND ETHICAL IN THEIR
PROFESSIONAL ACTIVITIES**

State Board of Tax Practitioners
3218 Pringle Road SE, Suite 120
Salem, OR 97302

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~IMPORTANT NOTICE~

Our records indicate that we do not have your e-mail address. In order for the Board to provide the best customer service possible, please provide the Board of Tax Practitioners (Board) with your e-mail address. The Board corresponds by e-mail to keep licensees updated with communications from the Board as well as to keep fees down so that those savings can be utilized to benefit licensees.

Send your e-mail address to tax.bd@state.or.us.

If you do not have an e-mail address, please notify the Board so that your licensee file is up to date.

If you do not respond to the board office by providing an e-mail address **OR** by notifying you do not have an e-mail address, you will no longer receive the Tax Board Bulletin by mail.

Please Note: The Tax Board Bulletin can also be viewed and downloaded from our website at:
http://www.oregon.gov/OTPB/news/News_Bulletins.shtml

If you have any questions regarding this notification, please contact us at:
Board of Tax Practitioners, 3218 Pringle Rd SE #120, Salem OR 97302

Ph: (503)378-4034 Fax: (503)378-3575 E-mail: tax.bd@state.or.us Website: www.oregon.gov/OTPB

MISSION: *The Board of Tax Practitioners works to protect consumers by insuring that Oregon tax professionals are competent and ethical in their professional activities*