

OREGON DEPARTMENT OF REVENUE POLICY

Effective Date:

March 28, 2025

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APPROVED: Betsy Imholt, Director

OWNER: Director's Office

REFERENCE: [DAS Policy 107-001-040, Enterprise Customer Service Policy](#)
[DAS Policy 50.010.03, Maintaining a Professional Workplace](#)
[DAS Guidance on Accessibility for E-Government Program Services](#)
[DOR 2022-2027 Strategic Plan](#)
[ORS 291.110 Achieving Performance Outcomes; Monitoring Agency Progress](#)

PURPOSE: To provide guidelines for maintaining accessible and responsive communication with the Department of Revenue's (DOR) customers and agency partners while reinforcing its commitment to cultivate an equitable customer service culture.

DEFINITIONS:

Customer service: Quality timely, accessible, equitable, and responsive support-based interactions between the DOR and its customers.

Key Performance Measures (KPM): Metrics developed by the agency per ORS 291.110 to improve the efficiency and effectiveness of the DOR programs and services it offers to its customers.

Professional workplace communication: Respectful, inclusive and professional interactions with customers that reflect the state of Oregon values and the agency's mission, vision and values.

POLICY:

The Oregon Department of Revenue is committed to collecting the revenue that Oregon counts on while creating a clear and easy customer experience. The department has a set of values to support its employees in performing the agency's mission. These values are:

- We work to earn the trust of taxpayers.
- We seek dignity and inclusion for all.
- We do the right thing.
- We build partnerships.
- We rise to the occasion.

These values guide the agency's employees in providing its customers with a high-quality customer service experience. The agency administers Oregon tax laws, supports partner programs, and acts as a central debt collection agency for other state agencies, boards, commissions, and local governments. DOR provides services to the general public, tax

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professionals, cities, counties, local taxing districts, tribal governments and other state agencies and considers these individuals and groups its core customers.

The department has developed this customer service policy in alignment with the Department of Administrative Services. The public can view the policy on DOR's website by clicking the Customer Service Standards policy hyperlink in the 'Links' section. DOR strives to continuously measure its customer service feedback to reinforce the agency's continuous improvement initiatives outlined in the agency's [strategic plan](#).

I. Professional Workplace Communication

Agency employees are expected to always engage both internal and external customers using professional workplace communication.

II. Accessibility

The agency will provide inclusive customer access by complying with the Americans with Disabilities Act (ADA), Enterprise Information Services (EIS) E-Government Guidance, and agency policies. DOR offers multiple communication channels, such as phone, video calls, email, and webform submissions.

Translation services are available upon request and the agency's translation plans can be found in the agency's [DEI plan](#). The agency will provide aid and services to persons with disabilities so they can participate in programs, services, and activities. Accommodation information can be found on the agency's [website](#).

III. Responsiveness

Agency employees must acknowledge receipt of all inquiries or requests within one business day, or by the deadline requested. Spam, marketing, listservs, phishing, or similar contacts are excluded. If an employee plans to be out of office for more than one business day, they must update their voicemail greeting and set an out of office auto-response, with the date they expect to return to work, and the name, phone and email of at least one alternate contact who can provide responsive service during the employee's absence.

Mail received will be processed according to the units' desk procedures. Desk procedures shall be reviewed annually.

IV. Customer Service Contact Information

Agency contact information including phone numbers, office locations, walk-in service locations, mailing addresses, hours of operation and instruction on how to schedule an appointment must be available on the '[Get Help](#)' page on the agency's website. This information will be updated as needed, but at least annually, by Communications.

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Agency programs with public-facing offices and contact centers must establish operating hours based on business needs. Operating hours must be posted on the agency's website. Any planned changes to these hours must be approved by the director, published through all agency communication channels and reflected in employee out-of-office messages as appropriate depending on the duration of the closure.

V. Key Performance Measures (KPM)

The department evaluates the following measures of customer service in its KPM: availability of information, helpfulness, timeliness, accuracy, expertise, and overall customer service. Information is gathered through online surveys, Revenue Online, field offices, email and phone surveys. Results are monitored and used to improve the agency's customer service performance. The agency's progress toward meeting KPMs will be reported to the legislature biennially as part of the agency budget request.

VI. Customer Service Strategy

The department's customer service strategy is incorporated into its [Strategic Plan](#) and includes ongoing projects to guide the agency's customer service performance and continuous improvement. The strategic plan is developed with input from the agency's many customers and includes an annual report to demonstrate the agency's progress toward meeting the plan's goals.