



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
02/06/2023

This position is:

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

Agency: Department of Revenue

Division: Business

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: <u>Office Specialist 1</u>	b. Classification No: <u>C0103</u>
c. Effective Date: _____	d. Position No: <u>6384</u>
e. Working Title: <u>OS1</u>	f. Agency No: <u>15000</u>
g. Unit: <u>Registrations Compliance Administrative Support</u>	h. Budget Auth No: <u>000031990</u>
i. Employee Name: <u>VACANT</u>	j. Repr. Code: <u>OAS</u>
k. Work Location (City – County): <u>Salem - Marion</u>	
l. Supervisor Name: _____	
m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year ☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share	
n. FLSA: ☐ Exempt ☒ Non-Exempt	o. Eligible for Overtime: ☒ Yes ☐ No
If Exempt: ☐ Executive ☐ Professional ☐ Administrative	

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.

This position is in the Business Division of the Department of Revenue. The mission of the Department of Revenue is together, we collect the revenue that Oregon counts on. Our vision is to create a clear and easy experience for our customers. The work we do in the division supports and enhances the direction of the agency and provides funding for a multitude of state and local programs.

The division has program administration responsibility for corporation income and excise, corporate activity, employer withholding, marijuana, tobacco, cigarette, transit payroll and self-employment, fiduciary, estate transfer, and many other smaller tax, license, and fee programs. These combined programs have an annual revenue of more than \$14.5 billion per year (fiscal year 2022). The biennial division budget exceeds \$36 million. The programs we administer require partnerships with many including businesses of all types and sizes, other state agencies, local governments, tax professionals, and a variety of other organizations.

State of Oregon DEI Vision

Within this context of historical harms, changing demographics, intersectional identities, and more; our vision for the next five years and beyond is to:

- Dismantle institutional and structural racism in Oregon state government, and by doing so, have

resounding impacts on the communities of our great state.

- Build a more equitable Oregon where everyone has the opportunity to thrive and everyone's voice is heard.
- Ensure an inclusive and welcoming Oregon for all by celebrating our collective diversity of race, ethnicity, culture, color, disability, gender, gender identity, marital status, national origin, age, religion, sex, sexual orientation, socio-economic status, veteran status, and immigration status.

State of Oregon DEI Values

Putting racial equity at the forefront while understanding intersectionality. We must be bold and put racial equity at the forefront as a primary and pervasive location of oppression that connects with and worsens other identity-based inequities.

- Prioritize equity, anti-racism, and racial justice actions. Commitment to prioritizing equity and eliminating racial disparities involves taking action in our policies, budgets, decision-making, and daily work.
- Foster internal and external partnerships. Across the state enterprise and other institutions, community-based organizations are crucial to achieving racial equity. True partnership means shared power, listening, resolving tensions by creating solutions together, and scaling up what already works well.
- Ensure collective responsibility and accountability. As public servants, we have a collective responsibility at every level of government to proactively reduce racial disparities and barriers. We must establish measurements of success so that we can ensure improvements are real and ongoing.

State of Oregon DEI Goals

1. Establish strong leadership to eradicate racial and other forms of disparities in all aspects of state government.
2. Center equity in budgeting, planning, procurement, and policymaking.
3. Strengthen public involvement through transformational community engagement, access to information, and decision-making opportunities.
4. Improve equitable access to services, programs, and resources including education, health, housing, human services, environmental justice, criminal justice, and economic opportunities.
5. Foster an inclusive workplace culture and promote equitable hiring, retention, and promotion practices.

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:

Register businesses liable for Oregon Payroll Taxes and to provide information to the public. This involves having an understanding of Oregon withholding/transit tax laws, administrative rules, department policies/procedures, and unit procedures. Add, delete, or merge customers per requests received from multiple program areas throughout the agency. Provide assistance to agency personnel by answering questions regarding unit procedures and processes.

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
70%	NC	E	Retrieves incoming mail/faxes/emails from central mail pick up. Review incoming mail, scan and attach to the correct account. • Create work items for section personnel • Follow mail routing procedure Enter garnishment responses into garnishment response screen and create work item for section personnel.

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

			Scan Tax Information Authorization and Power of Attorney forms on to the appropriate account. Reviewing the form to determine if all the information is included. Send out denial letters. Enter or remove payroll services on accounts per the add/delete lists from payroll services.
15%	NC	E	Perform printer and copy machine troubleshooting. Investigates problem to determine appropriate action needed to have repair work done. Retrieve messages from phone system and route to appropriate person or area. Provides backup to team members per assigned task list. Maintains desk procedures and participates in updating unit procedures. Take minutes at various division meetings, composes, and distributes minutes to appropriate Revenue employees. Serves on division committees and provides clerical support for other projects as assigned by supervisor. As requested, makes copies and scans of various materials for the section. Ensures an on-going availability of supplies and forms for division's personnel use.
10%	NC	E	Update payroll tax accounts on computer system per written correspondence from businesses, update address changes and phone number changes.
5%	NC	E	Provide telephone coverage for Business Division/Withholding and Payroll Tax Section; answer incoming calls, using a call distributor phone system, from taxpayers, state agencies, general public and other department personnel. Answer questions from the public regarding program information and services. Take messages and/or transfer calls to appropriate area. Other 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.

- Occasional contact with irate or hostile taxpayers by phone or in-person.
- Occasionally subjected to profanity and threat of bodily harm.
- Continuous exposure to noise from phones, computers, and voices--in-open work area.
- Frequent leafing through files and file folders.
- Frequent use of computers, telephone and calculators, requires sitting and using keyboards and keypads for extended periods of times.
- Requiring lifting items, typically up to 15 pounds and occasionally up to 50 pounds, climbing stairs, bending, squatting, twisting, reaching, and walking--frequently over uneven indoor terrain.
- Requiring pushing carts, which may be loaded with over 100 pounds of mail and mail packaging, frequently over uneven indoor terrain.
- This position is routinely required to be in the office for up to five days per week, to processes and distribute physical mail and complete other assigned in-office tasks.

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.

1. State and federal tax laws, Oregon Administrative Rules, and bankruptcy codes.
2. Policies and Procedures Business Division.

3. Department of Revenue policy and procedure manual.

b. How are these guidelines used?

1. Tax laws and OARs are used to explain the law to the general public.
2. Business policies and procedures clarifies the work process.
3. Revenue policies and procedures define the current department's management policies.

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?
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".			
General public/Tax Services Unit	Telephone/written/in person	Give/Receive instruction and information.	Daily
Division managers and staff	Telephone/written/in person	Give/Receive instruction and information.	Daily

SECTION 7. POSITION RELATED DECISION MAKING

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

Provides information and determines who is best to assist if a caller needs more information. Using procedures the employee decides the most effective method to complete daily work or special assignments.

Improper decision or action can result in an adverse impact on the agency, loss of revenue, litigation, and may jeopardize collection of accounts. Wrong information can result in an incorrect action, missed deadlines, additional penalties or interest for taxpayer and poor customer service.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".				
Supervisor 1	6540	In Person/Written/Email/ Telephone	As Needed	for timeliness, accuracy, soundness of judgment, and compliance with laws and policies

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?

- | | |
|--|---|
| ☐ Plan work | ☐ Coordinates schedules |
| ☐ Assigns work | ☐ Hires and discharges |
| ☐ Approves work | ☐ Recommends hiring |
| ☐ Responds to grievances | ☐ Gives input for performance evaluations |
| ☐ Disciplines and rewards | ☐ 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:

- Good communication skills for public contact; ability to deal with difficult people.

SPECIAL REQUIREMENTS: List any special mandatory recruiting requirements for this position:

MUST COMPLY WITH LAWS AND AGENCY POLICIES ON OREGON'S TAX FILING REQUIREMENTS, AND LAWS PROHIBITING DISCLOSURE OR MISUSE OF CONFIDENTIAL INFORMATION.

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

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

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		