



STATE OF OREGON
POSITION DESCRIPTION

Agency: Department of Revenue

Facility: Business

[ ] New [X] Revised

- [X] Classified
[ ] Unclassified
[ ] Executive Service
[ ] Mgmt Svc - Supervisory
[ ] Mgmt Svc - Managerial
[ ] Mgmt Svc - Confidential

SECTION 1. POSITION INFORMATION

a. Classification Title: Administrative Specialist 1
b. Classification No: C0107
c. Effective Date: 07/01/2021
d. Position No:
e. Working Title: Administrative Specialist 1
f. Agency No: 15000
g. Section Title: Business
h. Budget Auth No:
i. Employee Name:
j. Repr. Code: OAS
k. Work Location (City - County): Salem-Marion
l. Supervisor Name:

m. Position: [X] Permanent [ ] Seasonal [ ] Limited Duration [ ] Academic Year
[X] Full-Time [ ] Part-Time [ ] Intermittent [ ] Job Share

n. FLSA: [ ] Exempt [X] Non-Exempt
If Exempt: [ ] Executive [ ] Professional [ ] Administrative
o. Eligible for Overtime: [X] 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.

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.

Our mission, vision, and values guide us as we serve our customers and collect revenue that supports the critical infrastructure of Oregonians' daily lives. The Department of Revenue's mission is, "together, we collect the revenue that Oregon counts on." The agency's vision is to create a clear and easy experience for our customers.

Our 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.

### 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:

Process payroll tax returns flagged by the automated system as needing review or correction. This includes researching and analyzing accounts to process original and amended returns, resolving account maintenance problems such as misapplied payments and billings created by return. Provide information of a highly technical nature and assistance to employers, CPA's, attorneys, payroll services, and bookkeepers nation-wide to ensure understanding and compliance with payroll tax filing and payment requirements.

**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
25	NC	E	<p><b>Process Suspended Returns</b> Using a specialized online computer system to independently review and complex payroll tax reports, i.e.: Oregon Quarterly (OQ), Schedule B, Annual Withholding Agricultural form (WA) &amp;/or Oregon Annual forms (OA), State Wide Transit Tax OR-STT-1 &amp;/or OR-STT-A (annual), that cannot be processed due to errors identified on the returns by the GenTax Computer Program. Communicate with taxpayers, tax practitioners, and attorneys, by phone or mail to request missing information and documentation on specific issues to complete the processing of returns. Upon receipt of taxpayer's response, determine validity of information and documentation to either allow or to adjust accordingly. Access Employment Department and DOR screens on a personal computer, to locate and receive true, amended, or duplicate returns, closings or other documents and make account adjustments as necessary.</p>
20	NC	E	<p><b>Account Maintenance</b> Independently reviews the accuracy of system generated tax and interest along with penalty percent as determined by Oregon tax laws. Perform necessary account maintenance, such as penalty abatements and payment transfers, to resolve account issues regarding misapplied payments, credits and balances per return and/or correspondence or telephone call with taxpayer. Analyzes subjectivity and/or accounting discrepancies of transit taxes and contacts taxpayers to discuss these issues. Based on research completed, using judgement for the next course of action is taken. Reverses system generated estimated returns and closes account based on information provided by taxpayer direct contact and/or correspondence following procedures. These maintenance issues are accomplished by inputting information on-line on a computer.</p>
50	NC	E	<p><b>Public Assistance</b> Initiate and respond to telephone calls and correspondence, i.e.: email, fax, ROL web message, regarding misapplied payments, billings, and returns. Answer technical questions about the various</p>

			payroll tax programs administered by the Department. Assist the public in preparation of their Oregon payroll tax returns by providing correct forms, publications, and explaining how to complete the forms as needed. Provide electronic filing options such as Frances for OQ's, and iWire/Revenue Online for submissions of W2's/1099's, WR, WA and STT. Help businesses understand and appropriately respond to department notices, procedures, and policies. Provide explanations and applications of laws, rules, policies and procedures relating to the filing requirements for Oregon payroll tax returns for the purpose of gaining voluntary compliance. Assist and educate taxpayers with set up, navigation, and use of self-service options such as, 'Revenue Online', DOR's online account portal for businesses. Provide technical assistance to ROL users, i.e.: resetting passwords, and unlocking accounts.
4	NC	E	Participate in unit, section and division work groups and committees and Account Resolution Unit (ARU) team meetings
1	NC	E	Perform other duties and special projects as assigned by the unit supervisor to meet the goals of the division and the Department of Revenue.

#### 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.**

Frequent contact with irate or hostile taxpayers by phone or in person who have received billing and/or correspondence initiated by the Department; use of the telephone for incoming and outgoing calls; continuous keyboarding to enter or retrieve data from a computer and reading on a computer screen; sitting and concentrating for long periods of time. Noisy work area; phones, machines, voices. Use of computers on a daily basis. May require sitting for up to 8 hours a day or 40 hours a week.

#### 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.**

Business Division procedures, Oregon Revised Statutes, Administrative Rules, Opinion and Orders, IRS Code and Regulations, Federal Bankruptcy Code, State and Federal Tax court decisions as they relate to taxation and Taxpayer Bill of Rights

**b. How are these guidelines used?**

The materials are used as procedure manuals and as references to understand and explain the payroll tax programs, reporting and filing obligations.

#### 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?
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>			
Taxpayers/Employers	E-mail, Fax, Phone/Written and In Person	Seeking compliance Give/receive information	Daily
CPAs, attorneys, banks	E-mail, Fax, Phone/Written and In Person	Advice and Give/receive information	Daily
Other Government agencies	E-mail, Fax, Phone/Written and In Person	Give/receive information	Daily
Department personnel	E-mail, Fax, Phone/Written and In Person	Give/receive information	Daily

## SECTION 7. POSITION RELATED DECISION MAKING

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

1. Researches and provides information on highly technical questions from taxpayers, employers, bookkeepers, attorneys and accountants nationwide and other state agencies and department employees.
2. Explains state laws, Attorney General's opinions, administrative rules and IRS code regarding multiple payroll tax programs.
3. Review payroll tax returns to determine if tax is appropriate or if it needs to be adjusted.
4. The ability to organize and prioritize in order to manage a large workload and meet deadlines; the ability to communicate effectively, orally and in writing, and make accurate and immediate decisions under pressure.

Decisions and information impact employers nationwide. Improper information and decision making may result in erroneous billings and refunds to taxpayers, bad public relations and loss of money to the department.

## SECTION 8. REVIEW OF WORK

**Who reviews the work of the position?**

Classification Title	Position Number	How	How Often	Purpose of Review
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>				
Revenue Supervisor 2		Visual approval or denial and Performance evaluations.	Daily or Quarterly	Checking for accuracy and completeness.
AS1 LW		Visual approval or denial and Performance evaluations.	Daily or Quarterly	Checking for accuracy and completeness.

**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:

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 cursor 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, employee name and position number.

**SECTION 12. SIGNATURES**

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

s/s Eileen Gilbert  
Supervisor Signature

2/7/2023  
Date

\_\_\_\_\_  
Appointing Authority Signature

\_\_\_\_\_  
Date