



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
1/24/24

This position is:

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

Agency: Department of Revenue

Facility: Salem - Main

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: <u>Operations & Policy Analyst 2</u>	b. Classification No: <u>C0871</u>
c. Effective Date: <u>11/1/2021</u>	d. Position No: <u>3619000</u>
e. Working Title: <u>Operations Analyst</u>	f. Agency No: <u>15000</u>
g. Section Title: <u>Processing Center</u>	h. Budget Auth No: <u>001226010</u>
i. Employee Name: _____	j. Repr. Code: <u>OAS</u>
k. Work Location (City – County): <u>Salem - Marion</u>	
l. Supervisor Name: <u>Joel Hernandez</u>	
m. Position: <input checked="" type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
n. FLSA: <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt	o. Eligible for Overtime: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Professional <input type="checkbox"/> 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.

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.

The Processing Center Operations (PC Operations) Unit is part of the Processing Center Section of the Information Technology Services Division (ITD). The unit's primary responsibility is to support the payment and tax return processing systems. This includes making sure they are configured properly and are continuously operational. This includes reviewing tax forms, testing vendor tax forms and vouchers, ensuring they can be processed within the system. Analyzing data for reporting and planning for tax processing season. Plan and implement necessary changes to support legislative policy that impacts processing. This unit also coordinates and implements improvements and changes to workflow as a result of policy, and procedural changes from program areas.

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:

Coordinate the planning, developing, testing, implementation and quality assurance of the return and payment processing systems. This position is a point of contact for day-to-day operational problems and partner communications. Partners for these systems include agency staff, agency management, vendors, and other state agencies.

This position is also responsible for providing consultation to management in the design, planning, and quality assurance of computer programs and interrelated automated and manual systems. In addition to

analyzing and maintaining agency performance measures, including long range objectives and goals for successful processing of paper and electronic documents.

This position will preform annual system updates and testing in preparation for each tax season. This includes annual testing and approving of external software vendors reproduced forms and submissions. These systems are designed to improve the operations of multiple divisions within the department and/or program partners in other agencies.

The scope and complexity of these activities require thorough knowledge and experience with diverse agency administrative and operational systems. It is required to be able to analyze and clarify complex issues and develop comprehensive solutions that can be communicated to management.

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 curser at end of a row (outside table) and hit “Enter”.			
25%	NC	E	Coordination and Liaison Acts as a primary liaison to other divisions and departments on system development and procedural matters. This includes consulting with other system managers and user groups, both inside and outside the agency, to identify solutions that work for all parties. <ul style="list-style-type: none"> • Represents the agency on interagency committees. • Prepares, explains, and justifies recommendations for decision makers • Prepares feasibility studies • Works to identify and implement system and workflow efficiencies • Researches and incorporates industry best practices into department processing systems • Prepares reports on system and processing center performance including but not limited to: <ul style="list-style-type: none"> ○ Ad-Hoc reports ○ Monthly reports ○ Quarterly reports ○ Annual reports
40%	NC	E	System Administration Acts as coordinator for multiple return and payment processing systems. Analyzes and determines the quality of existing policies system and resources to identify problems, forecast future needs, consider alternatives, and recommend solutions. <ul style="list-style-type: none"> • Researches and writes necessary documentation to initiate changes by submitting project proposals, business requirements, system design specifications, test scripts, etc.

			<ul style="list-style-type: none"> Assists the Information Technology Services section as a liaison in execution and maintenance of multiple processing systems Answers questions from and presents findings to various agency personnel, other agency, and groups, on division systems Design and present user training on new systems Provides user assistance, and investigates, system issues. Offering resolution when possible. Prepares and publishes specification documents for external software vendors that reproduce returns. Conducts annual testing and approval of forms, including the 2D barcode data for external software vendors.
5%	NC	NE	<p>Project Management</p> <p>Analyzes, develop, prepare, make recommendations, and present business cases for various processing center proposals, including annual system updates.</p> <ul style="list-style-type: none"> Coordinate, plan, document, develop, and implement various Processing Center proposals Participates in team projects as a team member, business expert, or project manager Report to management sponsors on project progress Report on problems for consideration and recommend corrective action Review documents for systems or processes that may impact the processing center Verify quality of project deliverables
5%	NC	E	<p>Legislative and Policy Analysis</p> <p>Review and analyze bills introduced during legislative sessions to determine fiscal impact related to the processing center systems, processes, and resource needs.</p> <ul style="list-style-type: none"> Communicate required changes to system, processes, and resources required to implement and administer legislation Analyze agency policy and review operating procedures as they relate to the processing center Analyze agency policy and review procedures as they relate to the processing of documents related to the programs administered by the Department of Revenue.
20%	NC	E	<p>Workflow Analysis & Program Monitoring</p> <p>Review, analyze and provide recommendations of workflow improvement and acquisition of new technology that provides improved operational efficiencies.</p> <ul style="list-style-type: none"> Identify areas of resource reallocation Evaluate alternative process flows and recommend the best solution Optimize business processes in coordination with employees within the section

			<ul style="list-style-type: none"> • Work with program managers to incorporate program and policy needs • Evaluate business practices and makes written and oral recommendation to management • Monitor systems to evaluate ability to produce expected results and initiate correction action or enhancements • Monitor processing center systems performance as related to compliance, agency goals, and key performance metrics
5%	NC	NE	Other duties as assigned
100%			

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.

Extensive use of a personal computer, requiring sitting for extended periods of time and repetitious hand movements. Work in proximity with others with frequent interruptions and distractions. Requires good verbal and written communication skills to present to small and large groups.

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.

Federal and state tax laws, administrative rules and policies, processing center procedures, procedures of other divisions. Technical policy and procedures such as design methodologies, system development life cycle, project management manuals, EDP system standards, and the revenue accounting manuals.

b. How are these guidelines used?

As sources of information for research, analysis, and system design. As models for presenting recommendations, proposals, and analysis. Also, as required formats for acquiring system and services.

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".			
Users	In person, Electronic Communication, Phone	Determine needs, clarify procedures, validate facts and designs, report progress, train users, identify and resolve problems.	Daily

Other analysts and programmers	In person, Electronic Communication, Phone	Communicate user experience and requirements, participate in design, and implement meetings, and coordinate project activity	Daily
Division, agency, and program managers	In person, Electronic Communication, Phone	Make recommendations, report progress, consult on policy issues, discuss goals, and obtain approvals	Monthly
Other agencies or task forces	Electronic Communication, Phone	Plan and implement joint systems and programs	Monthly
Contractors and Vendors	Electronic Communication, Phone	Monitor progress, resolve problems, and negotiate contracts	As Required

SECTION 7. POSITION RELATED DECISION MAKING

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

This position is a member of the processing center operations team that covers return and payment processing systems. The person in this position makes day to day decisions and recommendations on the configuration and administration of those systems. The person must be able to operate with a high level of autonomy and independence. This person will participate in group decisions about the policies and procedures that are implemented through processing center systems. The person may sometimes decide which issues to take on without getting management approval. This position makes recommendations on which systems to use and implement and must exercise excellent judgement and analytical skills. These decisions often involve many thousand of dollars and would impact the workload of hundreds of employees. The agency and division's management teams rely on this team to present a vetted list of pros and cons of alternative solutions accurately and thoroughly.

These decisions affect everyone in this and other agencies who use the systems. This includes the public who receive output from the system. Incorrect decisions will result in inadequate systems, delayed processing, and slow service. With a high number of taxpayers and dollars involved, incorrect decisions may have severe repercussions with the media, the taxpayers, and the legislature.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Revenue Manager 1	3175000	Monthly meetings and quarterly check ins.	Monthly/Quarterly	To review output of project results and expectations of the position

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

SECTION 9. OVERSIGHT FUNCTIONS**THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY**

- a. How many employees are directly supervised by this position? _____
How many employees are supervised through a subordinate supervisor? _____

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

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_____
Supervisor Signature_____
Date

Appointing Authority Signature

Date