



**STATE OF OREGON  
POSITION DESCRIPTION**

**Position Revised Date:**  
**04/20/2022**

**This position is:**

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

**Agency:** Department of Revenue

**Facility:** Collection Division

☒ New ☐ Revised

**SECTION 1. POSITION INFORMATION**

<b>a.</b> Classification Title: <u>Revenue Agent 1</u>	<b>b.</b> Classification No: <u>C5110</u>
<b>c.</b> Effective Date: _____	<b>d.</b> Position No: _____
<b>e.</b> Working Title: <u>Revenue Agent</u>	<b>f.</b> Agency No: <u>15000</u>
<b>g.</b> Section Title: <u>Other Agency Accounts</u>	<b>h.</b> Budget Auth No: _____
<b>i.</b> Employee Name: _____	<b>j.</b> Repr. Code: <u>OAS</u>
<b>k.</b> Work Location (City – County): <u>Salem - Marion</u>	
<b>l.</b> Supervisor Name: _____	
<b>m.</b> 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	
<b>n.</b> FLSA: <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt	<b>o.</b> 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.

The Department of Revenue administers 37 programs in the areas of personal and business income taxes, property tax, tobacco taxes, and a variety of miscellaneous tax programs. These tax programs fund both state and local government services. The department is organized into functional divisions - Personal Tax and Compliance Division, Business Division, Property Tax Division, Collections Division, Administrative Services Division, and the Information Technology Services Division. The Department of Revenue employs over 1,100 people and has a legislatively (2021-23) adopted biennial budget of approximately \$369.3 million. The delinquent debt collected by this division is approximately \$1.4B each fiscal year. The division's budget is approximately \$50 million total funds per biennium.

### 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

This position is in the Collection Division of the Oregon Department of Revenue in the Other Agency Accounts Unit (OAA). The OAA Unit collects \$115 million dollars per biennium in delinquent debt for over 180 state agencies and local municipalities. ORS 293.250 requires the Department of Revenue to render assistance in the collection of any delinquent account owing to any state officer, board, commission, corporation, institution, department, or other state organization, or to a county. The OAA program impacts other state agencies, individual debtors and taxpayers, and businesses

#### 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:**

The purpose of this position is to collect assigned debts from various agencies, based on collection criteria, maintain the integrity of the debtors' information, adding, deleting or changing information, and provide information to the public in a courteous and professional manner.

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

90%	NC	E	<p>Maintains the integrity of the agencies computerized database by verifying and updating confidential information when those who owe call the department.</p> <p>Refers to expectations, policies, procedures, and collection material to assist and collect on debt owed to client agencies.</p> <p>Assists the public in person, by correspondence, and by telephone to answer in-depth questions regarding collection procedures of various client agencies, and options available to those who owe to resolve their debts. Provides correct forms or publications as needed. Informs and educates callers to understand and appropriately respond to department notices, procedures and policies.</p> <p>Negotiates and establishes payment agreements based on the department procedures. Obtains, analyzes and confirms information from debtor records, public records, data warehouse sources, tax returns, and financial statements. Initiates and conducts searches and investigations to locate those who owe client agency debt who have not contacted the department for resolution. This is done through using the department approved computer applications, public records, and data warehouse options.</p> <p>Based on research to locate assets, employment information or other sources of income, confirms the ability to pay. If further collection action is needed takes appropriate enforcement action based on policy and procedures. Enforcement action includes docketed warrants, garnishment of assets, bank accounts, wages, contract payments, commissions, rents, and other sources of income.</p> <p>Utilizes on-line computer system to work accounts assigned daily or calls that come in. Reviews customer account details documents the conversation and makes needed corrections to the customer attributes as applicable.</p> <p>Investigates and documents each case individually and follow up by entering documentation into a computer system. Reviews account balances and recommends needed corrections. Locates and transfers missing payments. Refers to appropriate area for adjustments and account reconciliation. Reviews information obtained from financial statements, tax returns, employers, various agencies, or other sources.</p> <p>Works within timelines to explain the various options, such as appeal rights, doubtful liability, and the appeal procedures for conference, and Magistrate. Determines need to transfer</p>
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			accounts to temporary uncollectable, write off, cancellation, or considered for a field visit.  Monitors accounts on follow up items for collections based on policies and procedures.
10%	NC	E	Receives/Provides necessary training through mentoring to other agents when necessary. Receives technical training regarding laws, policies, and procedures using department resources. Assigned duties other than listed as needed.

## 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 hostile taxpayers who are frustrated or upset by phone or in person and occasionally in remote locations. Occasionally being subjected to profanity and threats of bodily harm. Continuous exposure to noise from phones, computers, machines and voices—in an open work area. Continual use of personal computer, telephone, and calculators. Requires sitting and using keyboards and keypads for extended periods of times with repetitious hand and wrist movement. May require sitting for up to 7 to 10 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.**

Use of state and federal tax laws; Oregon Revised Statutes, Oregon Administrative Rules, taxpayer bill of rights bankruptcy code that relates to the collection process, section policies and procedures, and the disclosure handbook.

- b. How are these guidelines used?**

The materials are used as procedure manuals and as references for determining the correct procedure in resolving the account. The technical nature of this position requires the person to have a working knowledge of the statutes, rules, and department policies and procedures. This person must be able to utilize these resources to explain the need to report taxes, appeal rights, and collection process and options to the general public, including attorneys, CPAs, and employers.

## 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?
<b>Note:</b> If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".			
Other Agencies	Phone	Give or receive information	Daily
Support Processing Staff	Phone/email/in person	Give or receive information	Daily
Debtors/Employers	Phone/ in person	Negotiate terms, give or receive information	Daily
CPA, Attorneys, Banks	Phone/in person	Advise, locate assets, give or receive information	Daily

## SECTION 7. POSITION RELATED DECISION MAKING

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

This employee must deal with a wide range of variables and make evaluations and determinations of collection procedures on a case-by-case basis, using related and complex collection statutes, administrative rules, agency policies and procedures. Examples include: doubtful liabilities, appeals, collection potential, method of collections, wage assignments, payment agreements and whether to hold or release tax return refunds. Make recommendations to acceptance and denial of settlement offers, write offs and cancelations. Determine how to handle extremely frustrated, upset and hostile persons.

Make decisions and recommendations based on laws, policies, and procedures. Improper decision or action can result in an adverse impact on the agency, loss of revenue, litigation, and may jeopardize collection of accounts.

## SECTION 8. REVIEW OF WORK

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

Classification Title	Position Number	How	How Often	Purpose of Review
<b>Note:</b> If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".				
Revenue Supervisor 1		The Revenue Supervisor 1 reviews work performed on specific accounts in the course of responding to taxpayer complaints. Manager also does call, and queue monitors based on an established review schedule to ensure that the work performed complies with established policies and procedures.	The Revenue Supervisor 1 Reviews weekly/monthly /quarterly reports for timeliness, site, and production information	In order to ensure that Other Agency Accounts is in compliance with agency policies and section expectations, calls and computer screen activity will be monitored or captured to ensure consistency of answers, for training, and to help understand the

				nature of the type of calls and volume received.
Lead Workers		Call and queue monitors are conducted by the assigned lead worker based on an established review schedule or at the Revenue Supervisor 1's request to ensure that the work performed complies with established policies and procedures.	Lead Worker reviews weekly/monthly /quarterly reports for timeliness, site, and production information	In order to ensure that Other Agency Accounts is in compliance with agency policies and section expectations, calls and computer screen activity will be monitored or captured to ensure consistency of answers, for training, and to help understand the nature of the type of calls and volume received.

## 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:

Excellent customer service skills including in-person, over the phone and through email.

Call Center experience using a computer to enter/retrieve/document information on customer accounts.

Experience explaining complex laws, rules, regulations and/or policies.

Demonstrated ability exercising excellent judgement and decision-making skills.

Ability to work independently without constant supervision.

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

*This position may be exposed to Federal Tax Information (FTI) while carrying out official job duties. To follow IRS Publication 1075 requirements, this position will be required to complete a federal fingerprint-based background check every five years.*

*This position must be in compliance with all tax programs administered by the department to which the employee is subject and must make or have made satisfactory arrangements to pay any debt owed by the employee that is collected by the department.*

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type
<b>Note:</b> If additional rows of the below table are needed, place cursor 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

/s/ Deanna Mack

Appointing Authority Signature

10/26/23

Date