



State of Oregon Position Description

Company: Department of Revenue
Organization: Mail Processing Unit - DOR
Service Type:

SECTION 1. POSITION INFORMATION

Job Profile Title:	Office Specialist 1	Job Profile ID:	0103
Business Title:	Office Specialist 1 (Unfilled)	Position ID:	000000008100
Employee Name:		Company ID:	15000
Representation:	OAS	Budget Auth No:	579840
Location:	Salem DOR Revenue Building		
Supervisor:			
Position:			
Time Type:	Full Time		
FLSA:	Non Exempt		
Exempt Reason:			
Overtime Eligible:	Yes		
Employee Type:	Permanent		

SECTION 2. JOB DESCRIPTION SUMMARY

Describe the program in which this position exists. Include program purpose, who is affected, size, and scope. Include relationship to agency mission.

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This position is in the Information Technologies Services Division, Mail Processing Unit. This unit handles approximately 1.8 million pieces of incoming mail for all tax programs administered by the Department of Revenue. This unit receives, sorts, cuts, extracts, assembles, and processes all tax returns, correspondence, and payments as quickly and accurately as possible. This includes the reading and deciphering of documents to determine proper handling and/or routing. Analyze, sequence and prep documents to be scanned into the Imaging software. Conducts research on documents and payments when needed to ensure they are added to the correct taxpayer and applied correctly. This unit enables the agency to deposit monies, issue refunds, process tax returns and correspondence in a timely manner.

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 the statement. The primary purpose of this position is to:

Open and sequence presorted mail based on PO Box number for all tax programs that are administer by the agency. Sort and work exceptions that require additional research or special handling.

SECTION 3. JOB DESCRIPTION

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.

30%

Pick up and Receive all incoming mail for all tax programs administered by the agency.

- Drive a state vehicle to the post office to pick up mail. Sign for certified mail and transport all mail back to the Revenue building.
- Load/unload mail truck. Transport to work area.
- Sort incoming mail by address or envelope size for automatic or manual cutting.
- Sort and route priority mail in a timely manner.
- Operate automatic or manual envelope cutting machine. Bundles and tags envelopes. Transport to Mail Opening Unit.
- Responsible for accurately counting unopened mail from previous day (backlog) and providing information to the Mail Lead worker.
- Responsible for scanning empty envelopes and transporting recyclable containers to the basement with the use of hand truck.
- Maintain equipment in work area by vacuuming, dusting, keeping all areas clear of unsafe conditions, and picking up staples off carpet.
- Responsible for keeping accurate count of all mail received, input information into computer to generate weekly reports present to the manager.
- Scan unclaimed mail received.

35%

Open (pre-sorted by PO Box number) incoming agency mail.

- Prepare documents to ensure compatibility for specialized scanners. Document prep work includes opening mail, date stamping, removing clips and staples, ensuring documents are in correct order, and adding separator sheets where necessary.
- Operate automatic or manual envelope cutting machine. Bundles and tags envelopes. Transport to passthrough shelving.
- Open, sequence, and sort all types of mail with or without cash according to established procedures.
- Assist in keeping all sections neat, organized, and desk supplies stocked.
- Assist in trouble shooting, machine maintenance, seeking advice when required.
- Prioritize, read, decipher, sort, and route or transport cash and noncash items to other units.
- Scan unclaimed mail received.

Process mail returns including unclaimed mail.

- Check returned and undeliverable mail to identify and update taxpayer addresses in Gentax.
- Add notes to taxpayer profiles in cases where updated addresses cannot be enrolled.
- Update other information on taxpayer profiles based on notations received from USPS

30%

Sort exception batches into computer work, research, and OS2 work

- When needed, photocopy double-sided or poor-quality documents to ensure legibility when imaged.
- Determine the appropriate programming job header sheet to ensure batches are correctly identified when imaged.
- Create State and Federal rejection letters as outlined in procedures.
- Conduct research for documents that require additional information.

Research and process incomplete payment vouchers to complete records and accurately direct funds.

- Intercept incomplete vouchers flagged during processing.
- Determine the source of incomplete information.
- Use system, program, and form knowledge to calculate and determine missing information.
- Directly review tax returns where necessary to help.
- Enter additional vouchers into GenTax where necessary to determine program recipients to ensure funds are disbursed accurately.
- Create or recreate vouchers for payments that come in without the correct voucher.
- Where information is so incomplete that a determination cannot be made, utilize GenTax to generate and issue letters to taxpayers.

5%

As required, work in other areas within the Processing Center to achieve maximum level of work, meeting required production and quality standards for such units/sections. Training will be provided as needed upon assignment. Perform other duties as assigned by supervisor.

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.

High production atmosphere. Work is performed in a typical office environment. There are frequent interruptions. There is sitting and concentrating for long periods of time (up to 8 hours a day); frequent reading of technical materials, instructions, procedures, and taxpayers' information. Ability to push carts of tax returns or fully loaded postal containers provided by the post office; lift and carry trays or tubs of mail weighing up to 40 pounds to or from shelves which are up to six feet in height. Extensive use of wrist/hand to operate manual staplers and staple removers. May require working at mail cutting or extracting (opening) station for up to 8 hours a day. May be required to work variable or extended hours as dictated by workload. Use of personal computer required for extended periods of time.

General knowledge of the statues, rules, and department policies and procedures. The person must be able to use these resources and adhere to the state's disclosure laws.

SECTION 5. GUIDELINES

List any established guidelines used in the position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Procedure manual available for all types of work done in the unit. Employees follow established department policies, OPEU contract and equipment manuals.

How are these guidelines used?

Desk manuals are referred to when opening, cutting, assembling, or sorting tax returns received by the department.

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	How	Purpose	How Often?
All agency personnel	In Person	Ask/Answer questions	As Needed
OPEX Corp. (vendor)	In Person	Machine maintenance	As Needed
Postal employees	In Person	Receive Work	As Needed
Processing Center work units	Email	Deliver work and answer questions	Daily
Supervisor	In Person	Questions and feedback	As Needed

SECTION 7. POSITION RELATED DECISION MAKING

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

Ability to make decisions following established procedures and priorities relating to cutting, opening, assembling, sorting, and routing of mail and tax returns without constant supervision; seek advice when necessary; must develop good working knowledge of all unit procedures. Seek advice from lead worker/supervisor as needed.

Wrong decisions could lead to improper crediting of payments, delayed responses to correspondence, potential disclosure issue, and poor taxpayer relations. Decisions relating to priority mail and tax returns could delay mail being routed correctly, delaying deposits of money for the agency, or delaying refunds to the taxpayers, thus having an adverse effect on the agency's and the unit's customer service.

SECTION 8. REVIEW OF WORK

Job Profile	Position ID	How	How Often	Purpose of Review
PEMA	3210	In Person	As Needed	Corrective Action

SECTION 9. OVERSIGHT

What are the oversight activities for this position?

SECTION 10. ADDITIONAL POSITION RELATED INFORMATION

List any knowledge and skills needed at time of hire that are not already required in the classification specification:

Ability to work in a high production team environment. Typing skills needed for using PC.

Maintain professional behavior as well as maintain harmonious working relationships and work in a team environment.

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.

SECTION 11. BUDGET AUTHORITY

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

Operating Area	Biennial Amount	Fund Type
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SECTION 12. ORGANIZATIONAL CHART

See Organizational Chart (attach copy or view within Workday).

SECTION 13. SIGNATURES

Employee

Date

Manager

Date

Appointing Authority

Date