



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
03/10/2026

This position is:

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

Agency: Department of Revenue

Facility:

- New
- Revise^d

SECTION 1. POSITION INFORMATION

a. Classification Title: <u>Administrative Specialist 1</u>	b. Classification No: <u>0107</u>
c. Effective Date: _____	d. Position No: _____
e. Working Title: <u>Taxpayer Services Front</u>	f. Agency No: <u>15000</u>
g. Section Title: <u>Program Services</u>	h. Budget Auth No: <u>001288930</u>
i. Employee Name: _____	j. Repr. Code: <u>OAS</u>
k. Work Location (City – County): <u>Salem Field Office, Marion County</u>	
l. Supervisor Name: <u>Marissa Loonam</u>	

m. Position:	<input checked="" type="checkbox"/> Permanent	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Limited Duration	<input type="checkbox"/> Academic Year
	<input checked="" type="checkbox"/> Full-Time	<input type="checkbox"/> Part-Time	<input type="checkbox"/> Intermittent	<input type="checkbox"/> Job Share

n. FLSA:	<input type="checkbox"/> Exempt	If Exempt:	<input type="checkbox"/> Executive	o. Eligible for Overtime:	<input checked="" type="checkbox"/> Yes
	<input checked="" type="checkbox"/> Non-Exempt		<input type="checkbox"/> Professional		<input type="checkbox"/> No
			<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.

The Taxpayer Services Unit (TSU) staffs two areas; payment center and call center. Payment Center's primary function is to provide education and assistance to Oregon taxpayers in person, via phone, paper mail, e-mail/electronic messages. Payment Center provides education and assistance with Oregon's tax laws through equitable lens that supports all. Payment Center provides partnership with other divisions within the

Department of Revenue to badge and direct visitors, triage incoming contacts to the correct unit, taking payments, answering questions about specific tax programs, and identifying issues that require special assistance for first visit resolution. Payment Center works to help collect the revenue our state needs to provide the services our citizens require. 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: "Together, we collect the revenue that Oregon counts on."

The Department of Revenue's vision: 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:

To help provide education and assistance and equity for all taxpayers, as well as compliance with Oregon's tax laws. Provide taxpayer assistance in the Salem Field Office (i.e. Payment Center) in person by answering taxpayer inquiries; requesting additional information to assist with tax issues and/or directing them to other departments as needed; generating letters for processes transactions; routing tax documentation to various agency departments; researching and reviewing the account to determine what action needs to be taken and then submitting work items for adjustments as needed; handling taxpayer paperwork and reviewing completion; physically collecting cash, checks, and cards for payment of all tax programs, using dual control as required; managing cash counting machines, delivering receipts to the taxpayer and logging cash into a drop safe for secure keeping. The employee in this position will also work in the reconciliation area bringing the cash out of the safe in dual control and preparing the documentation and physical bills for transport to deposit. This unit also provides a service to other divisions of the agency by badging and directing visitors, provides assistance as needed, answering questions about specific tax programs and problem identification.

This position is differentiated from other positions in the taxpayer Services Unit as this position

assists customers in person in the Payment Center, handles large volumes of cash, and facilitates large volumes of paperwork for taxpayers from external and internal sources.

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 curser at end of a row (outside table) and hit “Enter”.

35%	R	E	<p>Manage Payment Center and Taxpayer Assistance</p> <p>Provides assistance to the public and other employees face to face at the Department of Revenue’s Payment Center desk on the various revenue streams administered by the department. This includes information on inquiries regarding how and when to file, how to fill out all forms, including amended returns, etc. This position occasionally assists taxpayers over the phone, through correspondence and email.</p> <p>Answers questions and advises public on rules, laws, policies and procedures for department administered revenue streams in order to secure compliance or resolve problems, including changes made in processing, billings, or tax laws. Works independently, seeking assistance when needed</p> <p>Explains billings, sends financial statements, processes payments, comments system as to action taken on accounts</p> <p>Answers miscellaneous questions relating to withholding, Other Agency Accounts, including ordering forms, updating addresses and accounts on the terminal, explaining the revenue/employment combined form for reporting; various property tax programs; form and publication orders; gift and inheritance tax; sales tax; corporation tax; various administrative questions, etc.</p> <p>Research tax records and interprets data relating to individual circumstances</p>
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			<p>Arranges error correction if necessary or explains further action to be taken by the taxpayer. Calculates and makes mathematical computations to assist in explaining penalties, interest, and billing questions.</p> <p>Maintain strict confidentiality in daily contact by telephone or in person with taxpayer or their representatives for scheduling cash intake, answering questions, and advising them on rules, laws, policies, and accounting procedures for department administered tax programs to secure compliance or solve problems including changes made in processing, fillings, or tax laws</p>
25%	R	E	<p>Perform and coordinate administrative tasks in support to division and agency operations</p> <p>Handles large volumes of taxpayer paperwork, review for accuracy, then routes to the correct department for further processing.</p> <p>Review, approve/deny form OR-Auth-Rep and OR-Auth-Info.</p> <p>Answers questions and directs customers as necessary.</p>

			<p>Issues badges to all visitors to the Department of Revenue and direct the public to the proper person or section.</p> <p>Follows opening and closing procedures, including securing cash, badges, daily cash receipts, and lobby doors at end of day.</p> <p>Prepares and balances daily cash reports, section statistical reports, and resource manual updates.</p> <p>Monitors security cameras for activity in the agency lobby which impacts service at the window.</p>
20%	R	E	<p>Receive Taxpayer Payments</p> <p>Provide prompt and courteous assistance to the taxpayers or their representatives by receiving and processing all taxpayer payments including recreational marijuana retail sales, billings, estimated taxes, income taxes, withholding taxes, as well as various other taxes.</p> <p>Count cash using a cash counting machine. As appropriate, drop cash payments in a drop safe after logging. Sole or dual control depending on transaction amount.</p> <p>Management of a cash drawer to perform drops as necessary to prevent exceeding drawer limits and balancing cash drawer at end of each day.</p> <p>Process payments in the form of check or credit card.</p> <p>Credit appropriate tax account with amount, type and state of information in GenTax, leaving appropriate notes and provide taxpayer with receipt.</p>
15%	R	E	<p>Verification of Taxpayer Payments (Reconciliation)</p> <p>Report all deposits of taxpayer payments received from the drop safe (both cash and check) on Loomis log for armored car pick up.</p> <p>Count all cash transaction and verify the amount received by opening the bags of cash in the vault processing room. Recount, sort, face, and bundle cash for deposit. Complete banking deposit slip and prepare deposit bag.</p> <p>Report all reconciliation activity on drop safe, vault, and Loomis logs for auditing purposes.</p> <p>Scan all deposit paperwork into the system for processing.</p> <p>Note: Employees counting the cash when the initial taxpayer payment is received will not be involved in the 2nd verification of the amount in reconciliation thus exercising dual control throughout the process.</p>

5%	R	E	<p>All Tax Services Representatives participate in classroom and on-the-job training to learn technical and administrative data; assists in general office duties as needed; may be assigned to special projects in this section or other areas of the department as needed.</p> <p>May be on the phones at times with taxpayers to support business need.</p> <p>Other duties may be assigned as needed.</p>
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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.

Work daily in a secured area under video surveillance. Ability to maintain strict confidentiality at all times.

Regularly handle large sums of money with possible odor. Gloves provided.

Must be able to stand for extended periods of time.

Must be able to lift 25-35 lbs.

Office environment with exposure to printer and cash counting machine noise.

Extensive use of cash counting machine and personal computer.

High volumes of work during peak periods will require the employee to remain at workstation and assist public in person continuously during scheduled work hours. This position does not have the capability to telework and must be present in the office at all times. Employee is, at times, subject to hostile and irate taxpayers in person at the agency front desk.

Taxpayer Services and the agency's policy is to provide accurate, consistent information to all taxpayers. In order to ensure that Taxpayer Services is compliant with this policy, phone calls, camera recordings, and computer screen activity will occasionally be monitored or captured to ensure consistency of answers, for training, to help understand the nature of the volume of taxpayers needing assistance in the building. Customers may also be surveyed as to their satisfaction with our services.

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.

Department of Administrative Services administrative rules, desk procedure manuals, collective bargaining agreement, Department of Revenue policy and administrative procedures (PAP) manual. Oregon tax laws and administrative rules, Taxpayer Services resource manual, department procedures, federal tax publications and forms.

b. How are these guidelines used?

The DAS rules specify requirements to be followed by state agencies in accordance with generally accepted accounting and cash control principles. Desk procedure provide guidelines for performing specific duties. The PAP manual is the department's procedural interpretation of department and DAS policies and rules to answer taxpayer inquiries and to interpret tax laws and rules.

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?
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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".

Taxpayers or representatives	In-person/Phone/email	Accepting payments, satisfy taxpayer inquiry	Daily
Armored carrier personnel	In-person/phone	Secure cash transport for bank deposit	Daily
Department of Revenue Employees	In-person/Phone/Email/Teams	Resolve questions on payment center procedures or taxpayer accounts	Daily
Revenue Management Team	In-person/Phone/Email/Teams	Answer questions on procedural outcomes	As needed
Auditors	In-person/Phone/Email/Teams	Help with technical questions	As needed
Revenue Agents/Support Personnel	In-Person/Phone/Email/Teams	Help with collections inquires	As needed
All other sections whose information may be needed to satisfy taxpayer inquiry	In-Person/Phone/Email/Teams	Help with taxpayer inquiries	As needed

SECTION 7. POSITION RELATED DECISION MAKING

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

The person in this position will be making decisions on where to post payments received from the taxpayers, verify accuracy of payments received, and notify the taxpayer/representative if there is any inconsistency at time of cash intake.

Ineffective decision-making by these positions would create accounting errors and could result in taxpayers receiving late payment penalties due to scheduling errors. Processing errors would affect the timeliness, volume, and accuracy of depositing payment to the State Treasury and the posting of payment details to taxpayer’s personal or business accounts, which in turn, affect the daily deposits, fund investment availability and interest accrued for the State of Oregon.

Decides correct answer to taxpayer inquiries and whether or not to order a return to be reviewed.

Incorrect information could result in a billing or adjusted refund for a taxpayer. Could also result in additional work for other areas of Department of Revenue.

Decides when and what other departments to send taxpayers to for assistance.

Improper information can cost the taxpayer unnecessarily.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
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Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".

Revenue Supervisor 2		Oversees all work related to customer interactions, cash and safety controls, accuracy in reporting and transporting cash for bank deposits	Daily	To ensure acuate and consistent workflow

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:

Experience in banking and/or large volume cash handling experience.
 Experience exercising discretion regarding program or funds received.
 Experience in high volume production environment.

The Taxpayer Services Unit places a high value on customer service. Primary focus is to educate and assist the public regarding tax matters, assist with a variety of tax questions related to their personal and/or business accounts and to assist with compliance. Representatives use a variety of tools to access accounts.

Skill in oral and written communications, ability to learn and accurately interpret and explain technical data. Ability to work independently. Ability to accept verbal abuse from the public and work under stress while maintaining good working relationships with the public. Ability to recognize issues beyond level of training and expertise. Accepts constructive feedback, takes responsibility for their own actions, and implements necessary changes to improve performance. Adapts easily to change. Displays teamwork and a positive attitude. Able to meet all performance expectations as defined by the unit management team.

This position uses Spanish language skills to perform assigned duties to translate to and from English

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type
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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