



State of Oregon Position Description

Company: State Board of Accountancy
Organization: Licensing Unit - BOA
Service Type:

SECTION 1. POSITION INFORMATION

Job Profile Title:	Administrative Specialist 1	Job Profile ID:	0107
Business Title:	Licensing Program Specialist (Unfilled)	Position ID:	000000054134
Employee Name:		Company ID:	12000
Representation:	UA	Budget Auth No:	718850
Location:	Salem SBOA		
Supervisor:	Shelley Ostrem (Business Operations Supervisor 2)		
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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The Board of Accountancy is established and operates by authority of ORS 673.010 to 673.475, ORS 297.670 to 297.740 and OAR chapter 801. The Board is responsible for licensing and regulation of approximately 8,000 certified public accountants, public accountants, municipal auditors, and approximately 1,000 public accounting firms. The Board of Accountancy protects the public by ensuring candidates meet appropriate educational milestones, by issuing licenses to individuals who have demonstrated professional competence, through regulation of accountancy firms, and through administration of the Board's continuing education requirements.

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 primary purpose of this position is to provide office support, analytical and technical support in certain aspects of the licensing

program and associated Board committee work. This position is also expected to evaluate continuing education documentation to ensure compliance with Board rules and statutes. This is accomplished by analyzing applications for completeness and eligibility for licensure and providing informal and formal training as necessary.

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.

75% NC E Qualification Analysis & Technical Duties for Licensing Program

- Prepare and review applications for initial and renewal licensure for CPA and PA licensees to ensure compliance with Board rules and statutes.
- Provide recommendations regarding licensing eligibility to the Deputy Director.
- Communicate and solve problems with licensees and applicants.

Initial / Reciprocity License Applications

- Communicate with and/or review applications and support documentation for compliance with Board statutes and rules.
- Review application documents for authenticity.
- Analyze and apply technical qualification standards for licensure.
- Document supporting information and recommend action.

Reinstatement Applications

- Create and maintain reinstatement applications based on individual requests and rule changes.
- Interpret fee schedule and required continuing education for lapsed licensees or those who wish to update their status from inactive or retired status.
- Analyze reinstatement application and related continuing education certificates for compliance with applicable Board rules.
- Recommend licensee for reinstatement based on employee's conclusion of the application and create an approval/denial letter for the Licensing Coordinator

License Renewal

- Review applications for completeness and compliance with applicable Board laws and rules and handle all aspects of application processing and data entry.
- Recommend action if review of CPE log shows the licensee is deficient of the minimum requirements for renewal.

Other technical duties

- Respond to compliance staff inquiries related to exam/license applications, renewals, or CPE.
- Communicate daily with stakeholders and the public to explain the Board's licensing rules, policies, and processes.

5% NC E Process Improvements:

- Recommend process improvements in licensing for individuals, to support efficiency, electronic records and information technology improvements.
- Learn new Board operations and/or software.
- Develop program manual/procedures for accuracy and recommend changes.

20% NC E Support Duties:

- Maintain office equipment including scheduling routine maintenance of office equipment such as scanners, fax machine, printer,

copy machine, etc.

- Answer routine questions from the public about licensing and exam questions, administrative rules, etc.
- Process all outgoing & incoming mail including sort, date stamp, scan, and refer incoming mail to appropriate staff.
- Log and deposit all money, including checks, received by mail or in person.
- Maintain inventory and place orders for all office supplies when needed.
- Maintain payment records.
- Access Board application submission website daily to download all records with attachments resulting from on-line payment for agency services and placement of the records in the individual correct electronic location for each applicant & licensee.
- Act as back-up for other Licensing Specialists.
- Assist with administrative rule revisions and rule development processes.
- Develop and update Board forms as needed to comply with new policies and/or OAR's or to support change in practice to improve workflow.
- Assist in the development of long- and short-term goals for the licensing program.
- Provide administrative research as assigned by the Licensing Coordinator.
- Provide formal or informal training to stakeholders.
- Process accounts payable for review by Deputy Director.
- 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.

This position may have occasional exposure to disgruntled members of the public or licensees by phone or in person. Daily use of a computer, email, copy machine, telephone, scanner, and fax machine, and requires working knowledge of a variety of online systems and databases. Heavy lifting is required on occasion. This position requires you to be able to work in a fast-paced and collaborative working environment with an open office/open door concept.

SECTION 5. GUIDELINES

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

- Oregon Revised Statutes (ORS 673.010 to 673.475, ORS 297.670 to 297.740)
- Oregon Administrative Rules (OAR chapter 801)
- Oregon Accounting Manual (DAS Statewide Policy)
- DOJ Public Meetings and Records Manual
- Licensing Specialist Desk Manual
- Scanning Protocol
- Gateway Manual by NASBA
- Accountancy Licensing Database (ALD) and Accountancy Law Library (ALL) User Manuals from NASBA
- Records Retention Schedule by DAS
- AICPA PRIMA Guidance to navigate Facilitated State Board Access (FSBA) for peer review results
- Peer Review Procedures Manual published by OSCPA

How are these guidelines used?

Most of these references are used for general information and guidance. They are training tools used to assess whether an applicant (individual) qualifies for licensure (initial or renewal), to ensure that the Board and its committee have the information necessary to support its operations, and to ensure that public meetings and records guidelines are adhered to.

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?
Board Members	In Person, by mail, email or telephone	Coordination of meetings and general discussion regarding Board business	As Needed
Committee Members	In Person, by mail, email or telephone	Requests for information on licensees or applicants. Coordination of information regarding license, exam and disciplinary actions.	As Needed
Licensees/Applicants/ Candidates	In Person, by mail, email or telephone	Answer questions regarding the licensing, exam, renewal processes, CPE, eligibility, compliance, and other general questions that relate to the BOA.	Daily
Members of the public	In Person, by mail, email or telephone	Answer questions regarding the licensing, exam, renewal processes, firms, CPE, eligibility, compliance, and other general questions that relate to the BOA.	Daily
Other State Agencies/ National Association	In Person, by mail, email or telephone	Requests for information on licensees or applicants. Coordination of information regarding license, exam and disciplinary actions.	Weekly

SECTION 7. POSITION RELATED DECISION MAKING

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

This position analyzes and reviews individual application files for completeness and evaluates their compliance with Board laws and rules related to qualifications for licensure and renewal. The licensing specialist makes recommendations to the Deputy Director for approval or denial of an application file.

This position is also directly responsible for tracking application progress. Failure to present clear, complete and accurate information may cause a significant delay in processing and economic impact to the applicant and can contribute (in combination with other process failures) to incorrect license issuance or incorrect denial of an application, which may cause harm to the public or applicants and result in liability for the Board.

SECTION 8. REVIEW OF WORK

Job Profile	Position ID	How	How Often	Purpose of Review
Agency Head 9	0000001	In Person, by mail, email or telephone	As Needed	Forward facing internal/ external outreach focused. Policy setting that impacts the agency at the macro level and trickles down to processes at the licensing level. Sets policy direction. Review work, prioritize workload, provide guidance.
BOS2	0000007	In Person, by mail, email or telephone	Daily	Evaluate the quality of work and review and update individual priorities and problem solving. Resolve workflow processes and increase efficiency and accountability. Direct oversight of all business operations.
Business Operations Supervisor 2	0000007	In Person, by mail, email or telephone	Quarterly	The purpose of this review is to assess the employee performance against the employee's position description, and as applicable established work plans, previous performance evaluations and goal and objectives set for the upcoming year.

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:

Efficient in Microsoft Office products,
Word: Intermediate
Excel: Intermediate
Outlook: Intermediate
•Efficient in Zoom and Microsoft Teams

- Efficient in usage of the Board’s licensing database (FileMaker and potential successor systems)
- Clear & effective communication skills
- Time management and task prioritization skills
- High work ethic
- Ability to meet hard and soft deadlines
- Organizational skills
- Understand and identify compliance issues
- Motivate and direct people to complete a task or correct an application

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
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_____ Manager	_____ Date
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_____ Appointing Authority	_____ Date
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