



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: 10-31-23

This position is:

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

Agency: Office of Long-Term Care Ombudsman

Facility: 830 D Street NE, Salem, OR 97301

New Revised

SECTION 1. POSITION INFORMATION

Form fields for position information including Classification Title, Effective Date, Working Title, Section Title, Employee Name, Work Location, Supervisor Name, Position type, FLSA status, and Overtime eligibility.

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 overarching mission of the Office of the Long Term Care Ombudsman is to protect the individual rights, promote independence, and ensure quality of life through informed advocacy and education for Oregonians living in long-term care and residential facilities and Oregonians with decisional limitations.

the Legislature and the Governor on long-term and residential care issues. The agency establishes productive relationships with senior organizations, disability organizations, mental health organizations, advocacy groups and cooperative associations that impact the lives of long-term and residential care residents. The Office is mandated by the federal Older Americans Act (42USC3058g) and the state enabling statute is ORS 441.100-153.

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:

This position serves as the primary point of contact for information and referral services, and maintains appropriate flow of office processes and procedures in support of staff in the Long Term Care Ombudsman office.

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
45%	NC	E	<p>Information and Referral Services</p> <p>Serves as the primary and first point of contact for clients, interested parties, general public, and others seeking to obtain information about programs and services, file a complaint, or correct information and/or materials.</p> <p>Interview callers to gather information to clearly understand the nature and basis of the issue. Analyze the subject matter to determine what information should be used in answering questions, what resource is the most appropriate to disseminate; what referral services is the most appropriate; explains or clarifies rules, processes and procedures; and triages case calls for placement in the case management system (FileMaker Pro) where the appropriate regionalized deputy ombudsmen or volunteers will take action.</p> <p>Exercises skill in diffusing and calming callers who may be medically fragile, angry, confused, scared, or disoriented who are seeking assistance. Clearly articulates the agency services available or describes where more appropriate resources are relevant to the caller's needs, including how to navigate websites and access to additional information.</p> <p>Determine if matters require immediate attention by the deputy ombudsman on duty and/or the regionally assigned deputy ombudsman, including one-hour notifications of move-out or transfer of clients from facilities. Ensure case information accurately entered into the case management system. Refer cases, as appropriate to regional volunteers and or deputy ombudsmen.</p> <p>Redirect or take messages for other calls intended for the director, deputy director, or other staff.</p>

40%	NC	E	<p>General Office Support</p> <p>Serves as business and clerical support for the entire agency and its three distinct programs.</p> <p>Receives, sorts, and distributes incoming mail daily including shuttle mail, certified mail, and fax. Ensures timely processing and routing of all incoming correspondence to appropriate staff.</p> <p>Composes and types a variety of correspondence, reports, memos, and other information requiring general knowledge of agency operations. Determines proper formats and modes of address for letters and reports.</p> <p>Organizes and maintains filing systems, including policy, procedure, and other manuals. Schedules appointments for one or more individuals. Makes travel and meeting arrangements, prepares expense claims, orders office supplies, and maintains inventory. Orders business cards, prepares training manuals, and orders other print materials for the Agency.</p> <p>Examines invoices, orders, forms, and other documentation for accuracy and completeness. Adds, deletes, or changes information to maintain accurate, complete, and current information. Determines actions necessary to obtain correct or missing information.</p> <p>Maintains records according to records retention policy. Resolves record processing problems. Keep office manuals and processes updated.</p> <p>Utilizes agency technology systems including FileMaker Pro (case management), Microsoft Teams, SharePoint, Outlook, and Microsoft Copilot tools to support efficient office operations, voicemail management, and communications.</p> <p>Handles a high volume of calls on the toll free complaint line and processes voicemails daily, triaging urgent matters for deputy ombudsmen response.</p> <p>Provide backup logistical support for the ROPGAB meetings as needed, including ordering, coordinating and delivering food, assisting with meeting with meeting setup, taking notes and other support.</p>
5%	N	E	<p>Vehicle and Equipment Coordination</p> <p>Serves as the primary point person for management of the Agency vehicles, checking mileage, scheduling service and repairs and changing out tires as seasons change, working closely with DAS Fleet & Parking Services.</p> <p>Coordinate with contractors on recycling of equipment and paper, and shredding services. Serves as the Oregon State Surplus Property Reuse liaison.</p>

			<p>Coordinates facility repairs and maintenance needs with building maintenance, landlord, or owner.</p> <p>On a regular monthly basis, test security systems and assign keypad codes to staff, communicates with the security company about changes.</p> <p>Serves as the AATC for the phone system for the Agency.</p>
5%	N	E	<p>Development/Coordination of Office Processes/Procedures</p> <p>Assists LTCO in developing, monitoring and refining office processes, procedures and controls for carrying out LTCO Program support functions.</p> <p>Orients and trains new staff and volunteers on office support procedures and processes.</p>
5%	N	NE	Other tasks 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 involves frequent contact with executives, management, and staff both internal and external to the organization. It requires working with a variety of people and situations, which requires the incumbent to exercise diplomacy. Confidentiality of information must be maintained at all times. This position requires the ability to work on multiple tasks simultaneously, sometimes within short time frames, and interface effectively with business partners. It requires maintenance of tight deadlines and close coordination of a large number of tasks. Often travel to meetings is required with some travel to trainings. There can be frequent interruptions and demanding timeframes. This position requires significant use of a computer, phone system, and video-conferencing.

This position is not suitable for remote work options and requires presence at the central workplace in an office environment at 830 D Street NE, Salem, OR 97301. Regular and reliable in-office attendance is essential to fulfill the core duties of this role including answering phones, processing mail, and providing in-person office support.

This position requires the incumbent to possess and maintain a valid driver's license issued by the state where the employee resides and an acceptable driving record, or the ability to provide acceptable alternative means of transportation.

Incumbent must be able to lift 20 pounds to manage filing activities.

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

Federal Older American Act III B 307 (12) and related technical assistance and program instruction.
 ORS 441.100-153
 OAR 114-01-000 – 114-08-000
 Program policy and procedure
 State law and policies governing state agency operations

b. How are these guidelines used?

Adherence to specific laws, policy and procedure is required for agency processes and protocols.

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?
Regionally-based staff	Phone, email	Case referral and notifications	Daily
Businesses	Phone, email	Place orders for supplies or business services	Weekly
Other Agencies	Phone, email, fax	Make or receive referrals for services	Weekly
Volunteers	Phone, email, mail	Make or receive referrals for services	Daily
Clients and general public	Phone, email, in-person	Make or receive referrals for services	Daily

SECTION 7. POSITION RELATED DECISION MAKING

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

Makes day-to-day operating decisions related to management of phone system, record keeping, supply orders, building maintenance, car maintenance, and other office coordinating duties that arise. This ensures business operations are coordinated smoothly and efficiently, reducing the need for work stoppages.

Determines the urgency and response needs of case calls. Appropriate referrals of case calls must meet certain timelines and can mean whether clients receive appropriate services from deputy ombudsmen.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Agency Deputy Director		In person discussions, phone, email, text message	On going	Direct Supervisor – for consistency, accuracy, performance appraisals, etc.
Agency Director	1140001	In-person, phone, email	As needed	General Guidance
Deputy Ombudsman	Multiple	In-person, phone, email	As needed	Records, accuracy, updates, etc.

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:

Employment in this position is contingent upon:

This position is subject to a criminal records check, which may require fingerprints. If you are offered employment, the offer will be contingent upon the outcome of a criminal records check (FBI). Any history of criminal activity will be reviewed and could result in the withdrawal of the offer or termination of employment.

Possession of and maintenance of a current valid driver's license issued by the state of residence or the ability to provide an acceptable alternative form of transportation.

You are responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts; contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures.

Required Knowledge and Skills:

- Proficiency working on Apple Mac hardware and macOS operating environment.
- Strong customer service skills; effectively builds and maintains positive working relationships
- Expert proficiency in verbal and written communication skills including English usage, spelling, punctuation, grammar, and standard business principles
- Expert proficiency in word processing and data entry; minimum 40 WPM
- Proficiency in Microsoft 365 including Teams, SharePoint, Outlook, Word, Excel, PowerPoint, and Copilot tools
- Experience with or ability to learn FileMaker Pro case management system
- Ability to receive, sort, distribute and process incoming mail and fax in a timely manner including certified and shuttle mail
- Ability to work independently and as a team member with minimal supervision
- Ability to maintain regular, reliable, and punctual in-office attendance
- Strong analytical and organizational abilities with attention to detail
- Ability to triage tasks by nature, significance, and urgency in a team context

Highly Desired Attributes. Candidates possessing them will be given greater consideration:

- Knowledge and experience as an administrative specialist or in a comparable position
- Experience developing and using document tracking and calendaring systems
- Experience supporting a mobile team or groups of volunteers
- Experience with and/or knowledge of issues related to long-term care, mental health, or developmental disabilities
- Proficiency in basic math, budgeting, bookkeeping, and reporting
- Experience with FileMaker Pro report development
- Experience using social media to engage the public
- Excellent attendance and ability to be consistently punctual

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type

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