



State of Oregon Position Description

Company: Tax Practitioners Board
Organization: Tax Practitioners
Service Type:

SECTION 1. POSITION INFORMATION

Job Profile Title:	Administrative Specialist 1	Job Profile ID:	0107
Business Title:	Administrative Specialist 1 (Unfilled)	Position ID:	000000065187
Employee Name:		Company ID:	11900
Representation:	UA	Budget Auth No:	718730
Location:	Salem TPB		
Supervisor:	Laura Kardokus (Executive Director)		
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.

The mission of the agency is to protect Oregon consumers by ensuring Oregon tax practitioners are competent and ethical in their professional activities. The Board of Directors is made up of six Licensed Tax Consultants and one public member, all appointed by the Governor. There are approximately 1,400 Licensed Tax Preparers, 2,000 Licensed Tax Consultants, 900 Businesses and 200 Branch Offices Registered in Oregon Board programs are administered by a staff of 2.0 FTE. The board's 2025-2027 biennial budget is approximately \$1,162,920 in Other Funds expenditures.

The board develops and administers tax preparer and tax consultant credential examinations; maintains standards for professional education; develops and enforces a code of professional conduct for tax consultants, tax preparers, and businesses; investigates complaints about practitioners and tax return preparation businesses; and takes disciplinary action against licensees and unlicensed persons, including fines, restitution, license sanctions and pursuing criminal charges with other jurisdictions when appropriate.

Coordinate the Board's licensing program and verify practitioners' compliance with licensure requirements; Provide confidential staff support to the Director and professional staff with a wide variety of general office tasks.

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.

40% - R - Essential Function - Licensing Coordination

Coordinates the licensing program with guidance from director. Administers pertinent Board statutes, rules, policies and procedures. Provides excellent customer service. Answers phone calls and responds to general email inquiries. Maintains strict confidentiality. Reviews and processes license renewals. Verifies that license and renewal applications comply with Board statutes and rules. Processes and distributes licenses, certificates, registrations, renewal notices, lapsed notices and letters of ineligibility. Maintains all electronic and paper records. Coordinates review, update and preparation of forms and applications. Processes all payments received in the Board office both check and credit card. Maintains contracts with lodging and facilities located throughout the state for board meetings and community outreach, orders food and assists with setting up board meeting materials and the conference room.

25% - R - Essential Function - Licensing Exam Application Review and Coordination

Reviews and approves applications for the Board's three licensing exams. Processes payments for exam application fees. Creates database record for first-time examinees and updates those records as necessary. Responds to questions and inquiries from examinees, licensees, and exam administrator. Sends approval e-mails to applicants with information regarding their exam. Sends daily examinee approval lists to exam administrator. Receives daily exam results from exam administrator and updates relevant database files for each examinee. Reviews requests for special testing accommodations and obtains executive director approval as necessary. Communicates with exam administrator to ensure eligible examinees are allowed to bring certain forms and documents into the exam with them. Updates and maintains exam application forms as necessary.

15% - NC - Essential Function - Continuing Education Compliance Support

Advises licensees on continuing education requirements. Verifies submitted continuing education certificates submitted by licensees, pursuant to Tax Board statutes and rules. Checks database files of selected auditees to verify appropriate continuing education certificates have been uploaded. Follows-up with licensees as necessary to obtain continuing education documentation. Responds to questions from licensees and continuing education sponsors. Maintains and updates list of licensees selected for audit and records compliance status.

10% - R - Essential Function - General Compliance Support

Answers initial calls, emails and faxes from complainants. Assists the executive director in resolving complaints such as return of documents and contacting unresponsive / unreachable

tax practitioners. Responds to general questions from complainants regarding the status of their complaint. Assists Executive director by organizing confidential complaint and enforcement files. Assists in certified mailing and scanning of proposed orders and settlement agreements. Works with Board Chair for signatures needed. Assists Executive Director in maintaining list of monthly civil penalty payments and processing of those payments.

10% - R - Essential Function - General Office Support

Receives, screens, and responds to all callers and visitors. Redirects them to the director only when absolutely needed. Works with and assists the Director and the Board during board meetings. Orders and manages general office supplies. Prepares and processes invoices and travel reimbursements. Opens, sorts and delivers mail received in the Board office. Assists with maintaining and updating agency's web content. Assist with maintaining and updating the [Tax Practitioners General Information Book on Exams](#). Update and maintain the *Licensing Specialist Information Document*.

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 be considered for hybrid remote work and will require in-person attendance in a state office building environment. This position requires a high degree of independence, initiative and sound judgment. The employee works under the general supervision of the agency's Executive Director. Consults with the Director for clarification of assignments; reports progress on tasks; confirms interpretation of statutes, rules and policies; and seeks guidance when necessary. Employee interacts frequently with the general public. Occasional statewide travel is required. Some overtime may be required.

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, including Chapter 673 (Tax Consultants and Preparers)
Oregon Administrative Rules, including Chapter 800 (Board of Tax Practitioners)
Attorney General Model Rules of Procedure and Administrative Procedures Act Tax Board Procedures Manual
Attorney General's Public Records and Meetings Manual
Attorney General's Administrative Law Manual
The Standard Code of Parliamentary Procedures
Licensing Specialist Information Document
Tax Practitioners General Information Book on Exams

How are these guidelines used?

Employee applies guidelines when conducting administrative and licensing-related duties and when explaining board statutes and rules to the public and licensees. Employee applies rules, policies and procedures of the board when coordinating and performing office operations and licensing.

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/Information	Regularly
Licensees/Applicants	In Person, by mail, email or telephone	Licensing requirements/information	Regularly
Other government agencies	In Person, by mail, email or telephone	Information	Regularly
Taxpayers	In Person, by mail, email or telephone	Information	Regularly
Vendors	In Person, by mail, email or telephone	Coordination/Meetings/Information	Regularly

SECTION 7. POSITION RELATED DECISION MAKING

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

Employee makes recommendations to the Director. The employee makes decisions applying Oregon Revised Statutes and Board Rules when providing assistance to licensees. Poor decision making could result in forced repeal of improper rules, agency liability, inaccurate public information and inefficient office operations.

SECTION 8. REVIEW OF WORK

Job Profile	Position ID	How	How Often	Purpose of Review
Agency Head 9 (Executive Director)	000001	In Person, by mail, email or telephone	Regularly	To ensure accuracy, completeness and conformance with laws, rules and policies. Coaching and development and quarterly check-ins.

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:

Position requires effective communication skills and the ability to work with diverse individuals and groups orally and in writing. Employee must keep current on Oregon law and administrative rules concerning professional disciplinary activities and standards for credential examination validation and administration. Must maintain strict confidentiality of licensee information and other matters.

SECTION 11. BUDGET AUTHORITY

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

Operating Area

Biennial Amount

Fund Type

SECTION 12. ORGANIZATIONAL CHART

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

SECTION 13. SIGNATURES

Employee

Date

Manager

Date

Appointing Authority

Date