STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date: **5/18/23**

Agency: **DEPARTMENT OF REVENUE**

Facility: Salem

Division: Personal Tax and Compliance

☐ New ☒ Revised

This position is:

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

SECTION 1. POSITION INFORMATION

a. Classification Title:	Public Service Representative 3	**b.** Classification No:	C0323
c. Effective Date:		**d.** Position No:	
e. Working Title:	Public Service Representative	**f.** Agency No:	15000
g. Section Title:	Program Services	**h.** Budget Auth No:	000608670
i. Employee Name:		**j.** Repr. Code:	OAS

k. Work Location (City – County): Salem - Marion

l. Supervisor Name:

m. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share

n. FLSA: ☐ Exempt ☒ Non-Exempt

If Exempt: ☐ Executive ☐ Professional ☐ Administrative

o. Eligible for Overtime: ☒ Yes ☐ No

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.

Taxpayer Services in located in the Personal Tax and Compliance Division, in our Program Services section. The primary responsibility of Taxpayer Services is responding to taxpayer inquiries via telephone, correspondence or in person. There are 4 units within Taxpayer Services. Taxpayer services provides a service to other divisions of the Department of Revenue by badging and directing visitors, providing assistance as needed, answering questions about specific tax programs and problem identification. Taxpayer Services also handles the front counter where our customers can make payments, ask questions, drop off documents, and conduct other business with the Departmetn of Revenue.

The Taxpayer Services Units consists of approximately 45 team members - 4 Managers, 6 public service representative 4, 27 public service representative 3, 8 administrative specialist 1 and additional 20 seasonal positions for each tax season. The Tax Services Units contribute to the overall mission of the agency by responding to questions from the public and being a service unit dedicated to assisting the public by resolving problems and answering questions pertaining to taxes, billings, and other programs administered by the Department of Revenue and generally facilitating taxpayers through education and assistance.

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

Provide information and assistance to the public regarding approximately 54 programs administered by the Department of Revenue to achieve goals of compliance, education, equity, and public service. The Tax Services Unit strives to provide quality customer service to all customers, both internal and external. PSR3 must maintain a level of knowledge, through training and work experience, to provide education and acurtate information in a timely manner to all customers.

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.

Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*

Time %	N/R/NC	E/NE	DUTIES
100%	NC	E	Item #1 ○ Aids the public and other employees through phone, mail, email, and in person at the Department of Revenue's reception desk on the various tax programs 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. ○ Educates and directs public to resources on rules, laws, policies and procedures tax programs administer by Department of Revenue. To ensure tax compliance or resolve problems including changes made in processing, billings, or tax laws. ○ Explains billings, sends financial statement/tax documents, processes payments, notates Gentax accounts of interaction details including resolution/no resolution. ○ Answers miscellaneous questions relating to withholding, Other Agency Accounts, including ordering of 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. ○ Assists taxpayers in understanding individual tax records. Recognizes and completes correction processes including providing direction to taxpayers for self-resolution. Aides in providing penalty, interest, or billing education and calculation understanding.

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 call volumes during peak tax seasons that require team members to remain at work station and answer calls or assist public continuously during scheduled work hours (at least six months out of the year). Team members will encounter challenging customers that maybe hostile, vulgar or aggressive.

Taxpayer Services' and Department of Revenues expecation is to consistently provide high quality customer service with consistent, accurate information. Taxpayer Services leadership will regularly monitor interactions on the phone, in person or digitally to ensure cosistency and accuracy of information provided. Training and education on Department of Revenue customer satisfaction survey is provided for team members to be aware of how their interaction can impact the agency.

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.

Oregon tax laws and administrative rules, Tax Services Resource Manual, department procedures, federal tax publications and forms, Oregon Department of Revenue publications.

b. How are these guidelines used?

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?

Note: *If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*

Who Contacted	How	Purpose	How Often?
Taxpayers	Phone Email In-person Mail	Satisfy taxpayer inquiry	Average 50-60 per day
Auditors/Revenue Agent/Support team	Telephone In-person Email	Help with technical questions	Daily

All other sections whose information may be vital to satisfy a taxpayer inquiry.	Phone Email Face to face Internal Communication tools.	Resolve various tax matters for our taxpayers.	Daily

SECTION 7. POSITION RELATED DECISION MAKING

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

Decides identity of person on the telephone. If wrong decision is made, an inadvertent disclosure could be made.

Decides correct answer to taxpayer inquiry or whether to order a return to be reviewed.

Incorrect information could result in a billing or adjusted refund for a taxpayer.

Decides when and where to transfer a call, an improper transfer can cost the taxpayer unnecessarily.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".

Class Title	Position #	How	How Often	Purpose of Review
Revenue Supervisor 2		Reviews the work of this position by weekly meetings, periodic checks of written contacts and by listening to telephone contacts.		This review is to ensure that accurate information is given to taxpayers, to identify areas where additional training is needed, and to gain knowledge of the impact of tax programs on the public.

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?

- ☐ Plan work
- ☐ Assigns work
- ☐ Coordinates schedules
- ☐ Hires and discharges

- [ ] Approves work
- [ ] Responds to grievances
- [ ] Disciplines and rewards
- [ ] Recommends hiring
- [ ] Gives input for performance evaluations
- [ ] 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:

Taxpayer Services Unit values quality customer service. The unit's goal is to educate and assist the public with tax matters, assist in answering variety of tax questions related to their personal and/or business accounts to help maintain compliance. Team members use a variety of tools to access accounts. The ability to learn and use special telephone equipment and computer programs is vital to succeeding in this position.

SPECIAL REQUIREMENTS: List any special mandatory recruiting requirements for this position:

Proficient in oral and written communications, ability to learn and accurately interpret and explain technical data, to work independently, 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 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.

MUST COMPLY WITH LAWS AND AGENCY POLICIES ON OREGON'S TAX FILING

REQUIREMENTS, AND LAWS PROHIBITING DISCLOSURE OR MISUSE OF CONFIDENTIAL INFORMATION.

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

Operating Area	Biennial Amount ($00000.00)	Fund Type

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 <u>current</u> 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

For HR or Division Administrators only

Appointing Authority Signature	Date