



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
11/12/24

This position is:

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

Agency: Oregon Board of Optometry

Facility: Salem, Oregon

New Revised

SECTION 1. POSITION INFORMATION

Form fields for Section 1: a. Classification Title: Executive Support Spec 2; b. Classification No.; c. Effective Date: 1/1/2025; d. Position No: 0108; e. Working Title: Administrative Coordinator; f. Agency No: 96300; g. Section Title; h. Budget Auth No; i. Employee Name: New hire; j. Repr. Code; k. Work Location: Salem/remote; l. Supervisor Name: Shelley Hanson; m. Position: Permanent, Full-Time; n. FLSA: Non-Exempt; o. Eligible for Overtime: Yes

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 Mission of the Oregon Board of Optometry is to protect the people of the state of Oregon from the dangers of unqualified and improper practice of optometry. This work is accomplished through:

- 1. Licensing those engaged in the profession of optometry.
2. Responding to complaints from the public and members of the profession.
3. Public education directed at appropriate regulatory communities.
4. Cooperation with related agencies, boards and commissions.
5. Holding to the highest ethical standards.

The board serves more than 1,100 licensed doctors of optometry, working to ensure protection of public health, safety and welfare. The board regulates the practice of optometry in Oregon through setting standards for the examination of candidates for licensure, certification standards, continuing optometric education, and enforcement of the laws and rules governing optometry.

Operations of the Board are contained in one program that involves several major functions of the Board:
1. Examination and initial licensure;2. Renewal licensing:

3. Continuing education activities;
4. Enforcement/discipline;
5. Public information: and
6. General administration.

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 provides high level support to the Executive Director in the following functions:

- Maintains a specialized accounting system to track Board revenues and expenditures,
- Analyzes and tracks budgets and actual revenues and expenses,
- Oversees the licensing process, from application to renewal,
- Assists the Executive Director with the enforcement process, ensuring consistency and compliance,

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

30%	R	E	<p><u>Accounting and Budgeting</u></p> <ul style="list-style-type: none"> • Using generally accepted accounting principles, is responsible for entries into the Board of Optometry's accounting system Quickbooks. Maintain accurate and timely accounting information electronically and, as appropriate, in hard copy. • Receives and processes accounts payable and receivable as approved by Executive Director. Enters transactions into Quickbooks. Handle payments for expenditures in consultation with Executive Director by tracking invoices, cutting checks and routing checks for signature. Prints checks for Executive Director's signature and remits payment for all bills timely. Reviews documentation to determine dollars owed to vendors or that the agency is eligible to receive. Processes transactions timely to ensure no late fees are accrued. • Enters payroll expenses into Quickbooks after receipt from DAS Payroll and Executive Director approval. Processes payment for payroll and related expenses. • Prepares routine general journal entries for Executive Director approval. Enters journal entries into Quickbooks. Reviews errors and edits to isolate problem and advise Executive Director, on how to resolve it. • Communicates and coordinates accounting policies, practices and procedures; with agency, state and federal officials, vendors and the public. • Supports Executive Director in the preparation of check logs, Revenue/expenditure reports, balance sheets and comparisons of budget projection/actual on a periodic basis,
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			<p>generally quarterly and examines transactions for accuracy, propriety and reasonableness. Assists Executive Director in tracking Board investments.</p> <ul style="list-style-type: none"> • Prepares financial documents as requested by auditors for biennial audits of the Board. Assists the Executive Director in evaluating and responding to audit findings. • Makes recommendations to the Executive Director about potential enhancements to accounting practices. • Notifies Executive Director/Board President about any potential discrepancies or issues with accounting that would benefit from review and discussion. • Works with the Executive Director on public records management for accounting records, including setting up, monitoring, and making adjustments in a complete set of financial records to show financial activity for the agency. • Once the biennial budget is adopted, enter the two fiscal years into Quickbooks budget section and ensure they are accurate and match the adopted biennial budget. • Prepares and submits annual DAS financial report. • Submits liquidated and delinquent financial reports to SWARM timely. • Timely and accurately prepare any legally required 1099 forms and reports. • Notify Board Administrator of potential discrepancies with accounting records and provide supporting documentation for review. • Monthly pull the report of outstanding fees due to the Board and follow up for payment. Note any contact made in the licensee's record. • Prepares invoices for any inter-agency cost sharing or other fees/payments due to the Board.
30%	R	E	<p><u>Examination and Licensure/Certification/Renewals:</u></p> <ul style="list-style-type: none"> • Receives scores from NBEO on applicants who have applied for Oregon licensure—including Oregon law exam scores. • Reviews applications of candidates for Oregon optometric licensure and their certification to use diagnostic and therapeutic pharmaceutical agents. • Reviews requests of licensees petitioning for reactivation and/or reinstatement of license to practice optometry. Determine whether requirements for reactivation/reinstatement have been met and fees are accurately calculated and collected. • Disseminate information to licensees concerning the license renewal process for all Oregon active and inactive status licenses. • Works with ED to receive and record payment for license applications, license renewals and any other fees due. • Processes renewals of licenses through an online system. • Prints licenses and wall certificates for licensees, ensuring compliance with procedures and protocols for license integrity and tracking. Ensures appropriate fees are paid and processed.

			<ul style="list-style-type: none"> • Maintains data within the licensing database system and works with the Executive Director as necessary to troubleshoot technical problems with the system. • Receives and reviews applicant information and fees for Oregon licensure. Prepares and sends out incomplete application letter once application is received and fee paid. Letters will be mailed and emailed. • Prepares and sends out initial licensure letter to all new licensees with their initial license. Updates the letters as needed. • Receives and processes all wall certificate orders and fees from licensees. • Assists the Executive Director by timely responding to e-mails, phone calls and other inquiries regarding laws and rules related to licensing and applications. • Disseminates information to licensees concerning the license renewal process for all Oregon active and inactive status licenses. • Prints licenses after licensee has met all renewal requirements and the renewal has been approved by the ED. Ensures that license is mailed to the appropriate address for each licensee. • Maintains and reviews database for each renewal license fee, late fees, penalties, fines, wall certificate fees and other fees. Creates invoices for licensee online payment. Processes credit card phone payment when necessary. • Prepares correspondence to licensees regarding license renewal, late fees, late CPR renewal, and changes in therapeutic certification. • Process license verifications and licensee list requests after fee payment.
10%	R	E	<p><u>Assists the Executive Director in the management of Board resources:</u></p> <ul style="list-style-type: none"> • Timely monitors, orders, and maintains supplies for the Board office. • Monitors equipment status and orders service and repair. • Routes invoices to Executive Director for review and approval. • Establishes and maintains files and filing systems. At least quarterly, reviews lapsed license files and purge per the Board's retention schedule. • Implements retention schedules on Board records as approved by the Board and the State Archives Division. • Generally assists with organization and cleanliness of the office environment. • Other work as assigned by the Executive Director or is coordinated with a Board member. • Performs licensing system testing and looks at data integrity with the online licensing system and portals. Notifies ED and/or system vendor of any issues with the system. • Backs up the ED on website maintenance.

			<p><u>Meetings of the Board:</u></p> <ul style="list-style-type: none"> • Prepares Board member expense reimbursement forms for Board meetings. • Sets up the board meeting with documents and other items. • Timely prepares public session meeting minutes (they are due within 2 weeks of the Board meeting). • Reviews all official documents, such as meeting agendas and notices, newsletters web postings, general correspondence, and legal correspondence for grammar and accuracy.
10%	R	E	<p><u>Communication/Outreach:</u></p> <ul style="list-style-type: none"> • Communicates with consumers and the public concerning functions of the Board. • Responds to requests for Licensee lists and other routine public information. • Communicates effectively and confidentially with consumers and the public concerning functions of the Board. • Communicates with other agencies that interact with and impact the operations of the Board. • Disseminates information concerning Board functions. including written verifications of Oregon optometric licensure to other state boards of optometry, written and oral verifications concerning Oregon licensees to third-party payers; and other state and federal agencies dealing with health care. • Provides information to consumers concerning licensees and whether there has been disciplinary action by the Board. • Recommends website updates to Executive Director. • Prepares articles for the quarterly newsletter or email blasts. • Assists with Board educations presentations. • Maintains an accurate desk manual that is located in the shared drive for all staff use. • Makes updates to letters and correspondence related to license applications, license renewals and portals to effectively communicate with applicants and licensees.

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.

Highly innovative, creative problem-solver with the ability to analyze and recommend course of action for applications requiring independent judgment, decision making and problem resolution. Must have the technical knowledge in interpreting laws, rules, policies and procedures and applying interpretations to specific situations. Skill in communicating orally to explain decisions, provide information related to licensing/certification programs and the ability to communicate with persons of diverse points of view to resolve problems is critical. Skill in composing written communications such as responses to inquiries, narrative reports, instructional materials. Skill in coordinating diverse activities to ensure timely completion of projects, tasks, and assignments. Ability to maintain multiple records and various tracking systems. Regularly prioritize the workload to meet various deadlines. Recommend improvement to various processes related to improved customer service. Ability to research, collect, analyze, and interpret data as

needed. High aptitude for learning new things, detail oriented, and proficient using multiple computer programs. Exceptional customer service skills with the desire to constantly improve the customer experience. Able to contribute to the team's success through collaborating with co-workers, Board members and working independently at times.

Works in a typical office environment, with the majority of time spent working on computer, phones and filing systems. Often requires long periods of sitting as well as the use of various electronic, lateral and vertical filing systems. Daily communication with licensees and other individuals, some of whom are dissatisfied with Board rules or decisions; or who are filing complaints. Involves occasional minor travel required for local business transactions or meetings. Occasionally may need to work extended hours and weekends. Knowledge of personal computers and computer systems is essential.

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.

- ORS Chapter 683; ORS Chapter 676 and OAR Chapter 852.
- Oregon Administrative Procedures Act.
- Board policy and procedures.
- Applicable DAS policies and procedures.
- Oregon State Archives Records Retention Schedule.

b. How are these guidelines used?

These guidelines are used every day in the performance of the duties and responsibilities of the Administrative Coordinator position for the Oregon Board of Optometry. They are used for the following:

- Answer questions related to examination and licensure/certification, license renewal, and license reactivation.
- Rulemaking.
- Adherence to agency related policies.

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?
Licensees	Phone, mail, in person and email	Explain statutory and rule requirements. Address customer needs, provide customer service.	Daily
Board members	Phone, mail, in person and email	Answer questions, provide information in Board meetings and outside of meetings.	
National/Regional/local Associations	Phone, mail, in person and email	Share information related to Board functions/activities, respond to requests.	
Other state/local governmental agencies/boards	Phone, mail, in person and email	Fulfill requirements of MOUs and contracts, gather and provide information, build partnerships and understanding.	
General Public	Phone, mail, in person and email	Explain statutory and rule requirements; provide general information about Board, gather information for Board consideration.	

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

Vendors/Contractors	Phone, mail, in person and email	Oversee delivery of services and payments for contractual agreements, update agreements, and discuss establishment of new agreements or termination of existing agreements.	

SECTION 7. POSITION RELATED DECISION MAKING

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

N/A

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Business Operations Manager 1/Executive Director		Daily interaction	Daily	Monitor workload, address employee questions and work-related needs. Annual review of work accomplished and set goals for next year.

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

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:

None

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 cursor 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