STATE BOARD OF EQUALIZATION
DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Business Taxes Compliance Specialist		**Business Taxes Compliance Specialist**	
UNIT/DISTRICT/LOCATION		POSITION NUMBER	
Special Operations Branch		**290-472-8694-043**	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**R01**	**2**	**None**
FINGER PRINTS REQUIRED		SUPERVISION EXERCISED	
☒ **Yes** ☐ **No**		**No**	

Job Requirements

Knowledge of:

- Organization of the Board of Equalization
- Departmental administrative policies, rules and regulations
- Sales and Use Tax Department compliance and collection functions, including delinquency and revocation procedures
- Sales and Use Tax Law, Special Taxes Laws, Code of Civil Procedure, Civil Code, Business Taxes Law Guide, Compliance Policy and Procedures Manual and Compliance Policy and Management Guidelines
- State operations, program activities and laws administered by related state, local and federal agencies
- General office procedures and practices

Ability to:

- Apply the above listed knowledge effectively
- Learn, interpret and correctly apply the laws, rules and regulations for all taxing programs
- Analyze situations accurately and take appropriate action
- Create and maintain cooperative working relationships
- Communicate effectively
- Maintain confidentiality of personal and politically sensitive material
- Work under pressure and meet deadlines
- Operate a personal computer utilizing a variety of software and/or various business machines
- Work in a high rise building
- Be flexible and willing to adjust to changing assignments and priorities
- Ability to deal with taxpayers under unfavorable or hostile conditions

Desirable Qualifications

- Excellent organizational and strong interpersonal relationship skills

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Statement of Position 290-472-8694-043

In the Headquarters Special Operations Branch, under the general supervision of a Business Taxes Compliance Supervisor III, a Business Taxes Compliance Specialist performs the more difficult and non-routine tasks received from field offices involving bankruptcy and collection cases and issues. The work reaches across multiple tax and fee programs. The tasks require a greater breadth and depth of experience and knowledge than required at the Business Taxes Representative level. Examples of non-routine tasks include: preparation of more complex bankruptcy claims for large amounts of money involving large corporations with many closely related subsidiaries; preparation of referrals to the Attorney General or out-of-state counsel involving bankruptcy cases in which the agency has to protect the State's interests; preparation of replies to complex tax and bankruptcy issues; review and support attorneys in preparation of legal documents.

Candidate must be able to perform the essential job functions (*) with or without reasonable accommodation.

PERCENTAGE OF TIME SPENT	DUTIES
	Essential Job Functions:
55%*	Handles the more complex and non-routine tasks, including but not limited to: preparation and filing of high dollar amount proofs of claims in corporate bankruptcy and legal cases; monitors these cases for compliance with applicable laws and rules; gathers and organizes information necessary for referral of a litigation case to the Attorney General, inside or outside counsel; prepares cover memos describing cases and summarizing issues for the Attorney General, inside or outside counsel when the Board has either been named as a party or is in litigation.
30%*	Review legal notices to determine and take appropriate action. Review accuracy of outgoing documents and correspondence prepared by Special Operations Branch Tax Representatives. Upon the conclusion of legal cases, analyze the cases and determine the appropriate adjustment, if any, of tax liabilities that may have been discharged. Review for accuracy and approve, if applicable, on-line and applicable adjustments to the Accounts Receivable upon closure of legal case.
	Marginal Job Functions:
10%	Accepts telephone calls and provides tax service and information to the title companies and legal community, taxpayers, and all levels of district personnel on all cases. Respond to questions and provides guidance to taxpayers, attorneys, trustees and staff. Provides assistance to the Taxpayers' Rights Advocate's Office, Board management and the Office of the Attorney General.
05%	Provides functional guidance to all levels of district personnel requiring assistance in bankruptcy and collection matters via written and/or verbal direction. Other job-related duties as assigned.

SIGNATURES

I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.

EMPLOYEE'S SIGNATURE	DATE

I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.

SUPERVISOR'S SIGNATURE	DATE

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