

## STATE BOARD OF EQUALIZATION DUTY STATEMENT

|   |                               |  |                                      |
|---|-------------------------------|--|--------------------------------------|
| CIVIL SERVICE CLASSIFICATION<br><b>Business Taxes Compliance Specialist</b>                                 |                               | WORKING TITLE<br><b>Business Taxes Compliance Specialist</b> |                                      |
| UNIT/DISTRICT/LOCATION<br><b>Special Operations Branch</b>  |                               | POSITION NUMBER<br><b>290-472-8694-016</b>                   |                                      |
| SEERA DESIGNATION<br><b>Rank and File</b>   | BARGAINING UNIT<br><b>R01</b> | WORK WEEK GROUP<br><b>2</b>                                  | CERTIFICATES REQUIRED<br><b>None</b> |
| FINGER PRINTS REQUIRED<br><input checked="" type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b> |                               | SUPERVISION EXERCISED<br><b>No</b>                           |                                      |

### 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 Law, 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

### Desirable Qualifications

- Must be flexible and willing to adjust to changing assignments and priorities
- Ability to deal with taxpayers under unfavorable or hostile conditions
- Excellent organizational and strong interpersonal relationship skills
- Proficient in using a personal computer, including various software packages such as word processing, spreadsheets and database programs

## Statement of Position 290-472-8694-016

In the Special Operations Branch, under the supervision of a Business Taxes Administrator I. The Business Taxes Compliance Specialist performs the more difficult and non-routine tasks involving specialized collection and lien issues across multiple tax and fee programs. In addition, this position will be responsible for the billings for the Court Ordered Restitution Program and follow up with District and Headquarters Staff on Court Ordered Restitution; preparation of referrals to the Attorney General or in-house counsel involving specialized collection cases in which the agency has to protect the State's interests; preparation of replies to complex tax and fee issues; review and support attorneys in preparation of legal documents. **Candidate must be able to perform the essential job functions (\*) with or without reasonable accommodations**

PERCENTAGE OF  
TIME SPENT

DUTIES

### **Essential Job Functions:**

50%\*

Monitor all active court ordered restitution and fines for SUTD and STFD during the period the tax/fee payer is on probation or parole. Monitor individual partners and corporate officers that were ordered to pay restitution on behalf of the partnership or corporation while the individual is on probation or parole. Perform the following duties:

Ensure restitution payments are made timely and applied appropriately. Create the unbilled cost of collection assessment on IRIS to track and monitor restitution payments. Make the necessary payment adjustments for restitution payments during the probationary or parole period. Ensure probation or parole terms and requirements related to the payment of restitution to the BOE are not converted or changed without proper notification.

Receipt and adjustment of restitution payments. Document actions taken if required restitution payments are not made, or if the tax/fee payer fails to make payment. Contacts made with the assigned probation or parole officer, County's Revenue Department, ID, SUTD, and STFD.

30%\*

Handles the more difficult and non-routine tasks, including but not limited to: Gathers and organizes information necessary for referral of a litigation case to the Attorney General or in-house counsel; Prepares cover memos describing cases and summarizing issues for the Attorney General or in-house counsel when the Board has either been named as a party or is in litigation.

### **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 collection matters via written and/or verbal direction.

05%

Other related duties as required

**( These job duties are essential in performing the required work functions in the position of a Business Taxes Compliance Specialist)**

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**SIGNATURES**

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***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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