

STATE BOARD OF EQUALIZATION DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION TAX TECHNICIAN III		WORKING TITLE TAX TECH III	
UNIT/DISTRICT/LOCATION SPECIAL OPERATIONS BRANCH - BANKRUPTCY		POSITION NUMBER 290-472-1975-xxx	
SERRA DESIGNATION RANK AND FILE	BARGAINING UNIT R 04	WORK WEEK GROUP 2	CERTIFICATES REQUIRED NONE
FINGERPRINTS REQUIRED <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		SUPERVISOR EXERCISED NO	

Job Requirements

Knowledge of:

- Organization of the State Board of Equalization
- Personal computer database, spreadsheet and word processing programs
- Business Taxes Law Guide; tax laws administered by the agency
- Bankruptcy Law
- General office procedures and practices

Ability To:

- Evaluate situations accurately and take effective action
- Create and maintain cooperative working relationships
- Communicate effectively, both orally and in writing
- Work under pressure and meet deadlines
- Operate a personal computer and/or a variety of business machines
- Work in a high-rise building

Desirable Qualifications

- Must be flexible and willing to adjust to changing assignments and priorities
- Excellent organizational and strong interpersonal relationship skills
- Proficient in using a personal computer, including various software packages such as word processing, spreadsheet and database programs

Statement of Position

In the Special Operations Branch – Bankruptcy Group, under the general direction of a Business Taxes Compliance Supervisor II, the Tax Technician III performs a variety of tasks with a minimal amount of supervision. This position will work to resolve delinquent taxpayer collection issues, handle case intake and assignment control issues, prioritize and distribute incoming case pleadings and legal correspondence, and provide support functions for section bankruptcy and legal collection caseload. **Candidate must be able to perform the essential job functions (*) with or without reasonable accommodations.**

PERCENTAGE
OF TIME SPENT
80%*

DUTIES

Performs a variety of tasks that support section goals and current electronic modernization initiatives. Tasks support section legal collection and bankruptcy case needs.

Maintains assignment controls and processes for Bankruptcy and Legal cases, including quality and accuracy control functions. Requests and distributes files and case materials. Prioritizes and distributes incoming case pleadings, court action documents, and legal correspondence.

For legal cases, work with case intake processes to enter, screen, and provide quality control in the identification and entry of new cases, identification and resolution of pre-existing collection actions for new legal cases which violate the federal bankruptcy automatic stay; contacts or corresponds with delinquent debtors to resolve missing returns and issues preparatory to the filing of legal claims to ensure tax recovery; performs necessary account maintenance activities on computer systems to support the specialized legal caseload. Issues "canned" letters to tax debtors to solicit compliance with legal case requirements.

For other collection cases, provides lien and other case support services, and performs basic collection activities as assigned to recover outstanding tax revenues. Issues statements and demands and other billing notices as required in support of the caseload.

Perform timely account review and drafting of non-bankruptcy claims, such as Probates, Receiverships, and Assignments for the Benefit of Creditors.

20%

Provides letter and legal document preparation support, including basic form creation and design as needed to support section needs. Performs document scanning, faxing, archiving, and related document support functions. As necessary, may provide related technical assistance and support to staff. Other related duties as required.

***(These job duties are essential in performing the required work functions in the position of a Tax Technician III)**

I have read this duty statement and fully understand my assigned duties.

EMPLOYEE'S SIGNATURE

DATE

I have reviewed these duties with the above named employee.

SUPERVISOR'S SIGNATURE

DATE