

STATE BOARD OF EQUALIZATION DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION Business Taxes Representative		WORKING TITLE Tax Representative	
UNIT/DISTRICT/LOCATION Special Procedures Section		POSITION NUMBER 290-472-8690-xxx	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGER PRINTS REQUIRED <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		SUPERVISION EXERCISED No	

Job Requirements

Knowledge of:

- Organization of the Board of Equalization
- Departmental administrative policies, rules and regulations
- Agency compliance and collection functions, including delinquency and revocation procedures
- Sales and Use Tax Law, Special Taxes Laws, Code of Civil Procedure, Civil Code, Government Code, other state codes, Bankruptcy Code and other federal codes, Compliance Policy and Procedures Manual and Compliance Policy and Management Guidelines
- State operations, programs, 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 laws, rules and regulations for all taxing programs
- Analyze situations accurately and take appropriate action
- Create and maintain cooperative working relationships
- Communicate effectively, both verbally and in writing
- 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, spreadsheet and database programs

Statement of Position 290-472-8690-xxx

In the Headquarters Special Operations Branch, Bankruptcy team, with guidance from a Business Taxes Compliance Specialist and under the supervision of a Business Taxes Compliance Supervisor II, the incumbent performs a variety of compliance/collection tasks. Prepares bankruptcy and legal claims and insures the Board's compliance with legal requirements. Provides technical advice, verbally and in writing, in response to contacts from field and tax program staff, taxpayers and their representatives and performs other duties commensurate with the position which may be required.

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

**PERCENTAGE
OF
TIME SPENT** **DUTIES**

Essential Job Functions:

80 %* Perform a variety of legal/compliance/collection tasks from the following broad patterns:

Legal Cases and Actions Ability to work independently and with a team. Analyze and interpret bankruptcy legal and financial data in order to recommend and prepare bankruptcy claims. Review account records for any related account liabilities, successor liability, pending audits, unresolved delinquencies, outstanding warrant fees, liquor license holds and lien issues. Ability to access, review and interpret Board data systems such as IRIS and ACMS as well as outside sources, such as PACER and Accurint. Request returns from taxpayers and/or their representatives. Assist taxpayers with their returns to establish pre and post petition liabilities. Ability to apply the tax laws in order to process a claim, calculate and prorate interest. Contact attorneys and trustees by phone and in writing for case information and followup. Manage a case inventory, scheduling followup and file claims within legal parameters in order to protect the Board's interest. May prepare or participate in legal referrals and defending Board claims or resolving tax debtor compliance issues.

Compliance/Collection Actions Review, initiate and resolve advanced and legal collection actions to support field and tax program compliance/collection functions including but not limited to warrants, liens, liquor licenses, levies and sureties. Review, analyze and make recommendations for billings on dual liability and similar secondary liability requests. Verify proper payment applications and adjustments to secondary liabilities. Research taxpayer assets, legal entity status, location, and ability to pay, and may negotiate voluntary payment arrangements, or take necessary adversarial actions to secure payment of outstanding debt. Review cases to determine if lien releases should be issued to taxpayer or escrow companies. Prepares statements and demand notices.

Marginal Job Functions:

10% Accepts telephone calls and provides basic tax service and information to the legal community, taxpayers, and Boardwide personnel on all cases. Respond to questions and provides verbal and written guidance as needed.

05% Provides basic functional guidance to all levels of Boardwide personnel requiring assistance in bankruptcy and legal collection matters via written and/or verbal direction. As necessary, may provide technical assistance and support to staff.

05% Other related duties as required.

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

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