

STATE BOARD OF EQUALIZATION DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION Tax Technician II		WORKING TITLE Tax Technician II	
UNIT/DISTRICT/LOCATION Special Operations Branch		POSITION NUMBER 290-472-1974-712	
SEERA DESIGNATION Rank and File	BARGAINING UNIT R04	WORK WEEK GROUP 2	CERTIFICATES REQUIRED N/A
FIGNER PRINTS REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		SUPERVISION EXERCISED None	

Job Requirements

Knowledge of:

- Board of Equalization's organization, policies and goals, and organization of the Special Operations Branch.
- Board Compliance Functions, including registration, account maintenance, delinquency, revocation, and collection procedures
- Board fiscal accountability and privacy policies and procedures
- Sales and Use Tax and related laws; Compliance Policies and Procedures; administrative policies, rules, and regulations
- IRIS (Integrated Revenue Information System) and ACMS (Automated Compliance Management System)
- Microsoft Office Suite and Windows operating environment, including use of Word and Excel
- Laws, regulations and policies governing the release of registration and other account information to the public and other government agencies

Ability to:

- Apply the above listed knowledge effectively
- Handle sensitive information and maintain confidentiality of taxpayer records and information
- Adapt to changing priorities and assignments
- Perform accurate mathematical computations, edit and proofread materials
- Use tact and good judgment when communicating, both written and orally, with all levels of staff in the Board, with the public, and others contacted in the course of the work
- Create and maintain cooperative working relationships
- Operate with proficiency a personal computer, photocopier, calculator, and other office equipment
- Evaluate the effectiveness of methods or procedures
- Perform assignments with minimal direction

Desirable Qualifications:

- Ability to express ideas verbally and in writing
- Strong organizational skills
- Flexible and willing to adjust to changing assignments and priorities
- Willing to do routine or detailed work

*HRD Approved 5/23/13 by DRD

Statement of Position 290-472-1974-712

Under the general supervision of the Business Taxes Administrator I, the Tax Technician II performs the full range of the more complex tax program related technical duties including account maintenance and offsetting, lien release processes, delinquency or other initial taxpayer contacts, telephone advisory services, and cashiering.

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

PERCENTAGE OF
TIME SPENT DUTIES

Essential Job Functions:

- 55%* Using a personal computer and the Franchise Tax Board's Secure Electronic Communications (SEC) program, identify tax debtors on offset lists who are earmarked to receive refund monies from the Franchise Tax Board. Using the Employment Development Department (EDD) offset lists and telephone communications; identify tax debtors receiving monies from EDD due to a refund. Determine if Board has outstanding accounts receivables that could be offset from either one of these agencies. Upon approval of the offset, compose and send notification letter to sister agencies to capture identified offset monies. Follow up for receipt of funds and proper application of payment. Responsible for tracking lost or misdirected offset monies and reconciling accounting differences between EDD, FTB and BOE. Maintenance of the SEC mailbox.

- 15%* Review the Lien Release terminal digit queue and determine if lien releases are appropriate. Prepare documents for Supervisor's signature and County Recordation using the ACMS lien program. Enter lien release recordation information into ACMS lien register. Solely responsible to review and reconcile billing statements for lien release charges for all 58 counties and Secretary of State. Verify transmittals, match to billings and take appropriate actions to resolve discrepancies, which may include contacting County Recorder's offices on discrepancies and initiating resolution. For some counties, additional research via web based tools and accounts will be required. Independently author memo to accounting for issuance of payment to each Recorder's Office for services rendered.

- 10%* Provides Technical Support to the districts in their registration and collection programs by reviewing lists from the Alcoholic Beverage Control Board (ABC) and determines if action is needed on pending transfers of Liquor Licenses. If it is determined that action needs to be taken because of outstanding delinquencies or accounts receivable, notify districts and provide information on remedy. Responsible to identify and prepare ABC Withholds, forward paperwork to ABC and notify the appropriate district office.

- 10%* Process requests from taxpayers on Teale and ACMS regarding their State Income Tax Refunds that BOE intercepted. If account has been paid in full or offset was taken in error, contact the taxpayer for information, trace the money, and write a report to BOE's Refund Section to have monies refunded to the taxpayer.

Marginal Job Functions:

- 05% Process incoming District Office requests for information from other agencies, sort and mail Certificate of Lien, and sort returned liens for recordation. Open mail that has Board funds and process in accordance with Boards Cashiering procedures.

- 05% Telephone advisory services and other job-related duties, as needed.

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

***HRD Approved 5/23/13 by DRD**