Revenue and Tax Specialist

FLSA Status: Covered (2230-2234) / Exempt (2235)
Bargaining Unit: District Council of Trade Unions (DCTU)

General Summary

Positions in this broad class function as business license, tax, customer service, and information and referral specialists to administer and secure compliance with City or County business licensing or tax codes and bureau regulatory programs, and to serve as a resource on Citywide services, direction, and referral. The class series has five levels including a lead and is based on progressively greater responsibility for leadership, industry-wide functions, account management, coordination, communications, collections, and accountability, as well as progressively greater skills, knowledge, and ability with respect to licensing, tax code, data systems, analysis, research, and taxpayer problem solving. Duties, depending on assignment, vary with business and tax cycles and involve operations, finance, and other related areas.

Revenue and Tax Specialist I - 30000191

Distinguishing Characteristics

The first level of the revenue and tax series typically is responsible for providing business license and tax customer service assistance, information and referral for bureau, City, and other jurisdictions, bureau-wide program operational and regulatory support, and participation in training activities requiring progressively greater skills, knowledge, and abilities. Duties range from performing problem solving in basic business license or tax programs to assisting in regulatory program processes using extensive communications and referral skills, triage, and a working knowledge of the bureau programs, codes, and data systems for license application and return processing. The class is distinguished from office support, data entry, and reception classifications in that it requires: the performance of duties relating to license and tax services; and regulatory program knowledge and bureau operations skills; effective communication techniques with tax or regulatory related interview skills; working knowledge of business and accounting terminology; and critical thinking and self directed work planning for peak volumes of taxpayer calls, visits, and returns. Level I is distinguished from Level II, which is responsible for reviewing, analyzing and entering detailed information on Sole Proprietor or individual returns.

Typical Duties/Examples of Work

Typical duties and examples of work shown below are intended to recognize that incumbents may be assigned to focus on customer service, operations, or other areas that reflect the multiple functions in the bureau; and that there are crossover general duties which may be common to these assignments. Crossover general duties are shown first followed by those relating to customer service and then by those relating to operations.

1. Reviews new license applications to determine if a business is subject to code provisions; sets up new accounts; conducts preliminary assessments regarding applicability of license provisions relating to specialty industry groups or other business functions.

2. Assists customers at the front counter with questions and ensures that all paperwork needed to process applications or returns is received.

3. Prepares and maintains correspondence and records to document license application and code compliance.

4. Participates in continuing education and training activities to gain skills and knowledge regarding the bureau licensing and tax functions, mastery of designated basic computer application menus, familiarization with other menus, and basic account functions.

5. Plans own day-to-day workload; and participates in team and bureau meetings, as well as process improvement, diversity, and other functions.

6. Performs initial contact front desk functions, such as explaining business license or tax code or regulatory procedures to the public, either in person or by phone; provides applications, forms, reports, and general instructions; performs preliminary screening, first response, and information referral functions; balances multi-program front desk issues and coordinates with other bureau and City personnel to initiate or expedite customer services, license application reviews, or tax return processing.

7. Initiates and responds to taxpayer telephone calls using program specific interview techniques, and prepares standard letters on code provisions to explain code procedures and facilitate compliance efforts; assists walk-in customers by initiating billings for fees and taxes or other regulatory program compliance processes.

8. Performs calculations involving payment of license, tax, or regulatory fees; receives money; and reconciles bureau cash transactions.

9. Opens mail; determines distribution; logs mail into separate Business License/Multnomah County Business Income Tax (BL/MCBIT) or Multnomah County Personal Income Tax (ITAX) systems; reviews for completeness of submission; and notes any exceptions, questions or concerns.

10. Scans reports and other documents; enters pre-selected field data into indexing application; and processes hardcopies for destruction and/or storage.

11. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

Knowledge of: basic customer account review and referral functions which involve rules, data systems, standards and procedures; proper English grammar, spelling and usage; business math; effective office operations and procedures; operation of a variety of office equipment and machines; cash handling procedures; and business practices.

Ability to: establish and maintain effective interpersonal relationships with a diversity of others; work effectively with customers who may be angry, upset or confused; handle a high volume of calls while assisting customers in person; maintain confidentiality; effectively communicate technical information, orally and in writing; work effectively in a multi-task and deadline driven environment; provide effective customer service by providing assistance and/or referrals; discern appropriate responses and alternatives, and apply judgment within established parameters.

Skill in: keyboarding, data entry and word processing software.

Special Requirements

None

Classification History:

Adopted: 09-10-03
Created as part of the Bureau of Licenses Classification and Compensation Study 2-02 to 7-03
June 2009 - Change Job Class number from 2230 to 30000191, due to system change.

Working Conditions

Work at this level is typically performed in an office environment. Frequent interaction with the public in person and by phone to include angry and hostile persons.

Revenue and Tax Specialist II - 30000192

Distinguishing Characteristics

The second level of the revenue and tax series has responsibility for certain elements of Sole Proprietor or individual returns in addition to performing the duties and responsibilities of the Level I Specialist. Level II is distinguished from Level I, which does not review, analyze or enter detailed information on Sole Proprietor or individual returns. Level II is distinguished from Level III, which is responsible for partnership and corporation tax returns, and basic net operating loss analysis.

Typical Duties/Examples of Work

Typical duties and examples of work shown below are intended to recognize the multiple functions in the bureau as well as crossover general duties, which may be common to these functions.

1. Initiates and conducts taxpayer telephone calls and prepares letters with regard to return issues to explain code provisions, facilitate compliance efforts, or begin the process of initiating billings for fees and taxes.

2. Conducts preliminary reviews of sole proprietor tax returns for accuracy and initiates communications and follow-ups to ensure compliance with codes; bills customers for calculation errors or penalty and interest payments; and observes Bureau standards procedures and practices.

3. Prepares and enters business or tax information into computer system; identifies calculations and other data errors and omissions; verifies accuracy, and if determined appropriate refer to higher levels or auditors.

4. Performs Bureau data system functions; updates computer records; and conducts data searches and account information updates.

5. Identifies calculation errors and omissions, and completes forms or account batches with correct data; and composes required correspondence such as billing and adjustment letters or requests for supporting documentation.

6. Maintains data integrity and accuracy by performing data cleanup tasks and activities as an ongoing duty as well as by project assignment.

7. Prepares and enters various license application or tax return data, computations, documents and payments, such as quarterly payments, requests for extensions, bill payments, and other information; and processes account payments with production of batch deposits.

8. Performs account updates such as changes in “Doing Business As” (DBA), addresses, Social Security Number (SSN), Employer Identification Number (EIN), or entity data.

9. Coordinates and performs customer service, licensing application or tax return activities with other work groups such as audit, regulatory compliance, or marketing; makes referrals; requests reviews and investigations; and serves as an interface with other specialists, as needed.

10. Participates in continuing education and training duties to expand skills and knowledge regarding bureau and Citywide customer service and referrals, licensing application and tax return processing functions, mastery of designated computer application menus, familiarization with other menus, and account management functions.

11. May provide back-up assistance to Level I duties/positions during seasonal workload changes or as needed.

12. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

In addition to the Knowledge, Skills and Abilities of the Revenue and Tax Specialist Level I, the following are required at Level II.

Knowledge of: general concepts and provisions of city and county business license or tax codes, confidentiality rules, business terminology, or bureau regulatory programs and procedures; sole proprietor return elements, and general familiarity with types of tax returns and entities.

Ability to: review license documents for accuracy and compliance; process a high volume of documents; explain basic licensing, tax, or business concepts, standards, and practices; exercise critical thinking; perform intermediate math including fractions and percentages; effectively use customer service procedures for providing taxpayers with information on business licensing and taxes.

Skill in: using office suite software including word processing, spreadsheet, database and scheduling/email applications.

Special Requirements
None

Classification History:
Adopted: 09-10-03
Created as part of the Bureau of Licenses Classification and Compensation Study 2-02 to 7-03
June 2009 - Change Job Class number from 2231 to 30000192, due to system change.

Working Conditions

Work at this level is typically performed in an office environment with exposure to angry and hostile persons in person and over the phone.

Revenue and Tax Specialist III - 30000193

Distinguishing Characteristics

The third level of the revenue and tax series functions at a journey level with responsibility for mastery of Sole Proprietor or individual returns, certain partnership and corporation return elements, estate and trust returns, basic net operating loss analysis, or return reviews for prior tax year activity with penalty and interest. Level III is distinguished from Level II, which focuses on Sole Proprietor or individual returns, entering and verifying the accuracy and completeness of data, and for appropriate computer system functions; and would not routinely be assigned responsibility for various partnership and corporation, estate and trust returns, basic net operating loss analysis, or return reviews for prior year activity with penalty and interest except for training purposes. Level III is distinguished from Level IV, which is responsible for account management, license and tax analysis, communications and/or collections, all of which are more complex in nature. Duties, depending on assignment, vary with business and tax cycles, and may involve short-term special assignments in operations, finance, or other related functions.

Typical Duties/Examples of Work

Typical duties and examples shown in these sections are intended to recognize the multiple functions in the bureau as well as crossover general duties, which may be common to these positions.

1. Analyzes complex tax filings and payments, billings/credits/refunds which involve tax returns of partnership, corporation, estate and trust returns; identifies calculation errors and omissions; verifies penalty and interest calculations; runs queries to locate errors, and finalize edits and transfers; and completes forms or account batches with correct data for billings, credits/refunds, correspondence, and other matters. Analysis involves critical thinking and a high level of skill development.

2. Identifies and enters into database business information regarding possible new accounts found through physical sightings, advertisements by businesses, data matches and/or Internet searches or converts them to active accounts; and produces appropriate correspondence as needed.

3. Pursues collection of monies if initial billing is not satisfied by sending second notice letters and making telephone calls.

4. Assists taxpayers and their representatives to understand license, application, tax laws and financial calculations; and responds to questions and complaints about specific license application or tax return account correspondence.

5. May work on special projects/assignments in addition to regular workload.

6. Performs account updates such as changing tax years, based on information on tax returns or calls/information provided by taxpayers.

7. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

In addition to the Knowledge, Skills and Abilities of the Revenue and Tax Specialist Levels I and II, the following are required at Level III:

Knowledge of: City and County business license or tax codes, to include all elements of sole proprietor, and certain elements of partnership and corporation returns.

Ability to: review tax returns for accuracy and compliance; process a high volume of tax returns accurately; explain licensing, tax or business concepts, standards and practices; perform and explain intermediate math calculations including multiple level interest and penalty calculations, and basic net operating loss rules and calculations.

Skill in: using the bureau database system at an intermediate level, which includes account and payment information searches and understanding payment history information; generating appropriate billing and adjustment correspondence; reviewing and analyzing tax return and account information to ensure accurate entry into the bureau database.

Special Requirements

Some assignments may require valid state driver's license.

Classification History:

Adopted: 09-10-03
Created as part of the Bureau of Licenses Classification and Compensation Study 2-02 to 7-03
June 2009 - Change Job Class number from 2232 to 30000193, due to system change.

Working Conditions

Work at this level is typically performed in an office environment with exposure to angry and hostile persons. Limited or occasional field duties may be performed where incumbents are required to work in adverse weather conditions, around traffic, and in remote locations

Revenue and Tax Specialist IV - 30000194

Distinguishing Characteristics

The fourth level of the revenue and tax series functions at an advanced journey level with responsibility for mastery of complex partnership and corporation returns, innovative research, net operating loss analysis, return reviews for prior year activity with penalty and interest, or accounting and finance related functions. This level may provide a variety of license, tax, and accounting related technical support functions. Level IV is distinguished from Level III, which is at the journey level with responsibility for less complex business transactions and accounts. Level IV is distinguished from the Lead Level, which is additionally responsible for temporary lead or special project duties; and from Level V, which is responsible for on-going senior level program and/or lead worker assignments. Duties, depending on assignment, vary with business and tax cycles, and may involve assignments in operations, finance, and other functions.

Typical Duties/Examples of Work

Typical duties and examples of work shown below are intended to recognize that incumbents may be assigned to focus on operations, finance, or other areas that reflect the multiple functions in the bureau, as well as illustrate cross-over general duties which may be common to these positions. The crossover general duties are shown first, followed by those relating to finance and then by those relating to operations.

1. Coordinates and performs account management or program survey work for businesses not in compliance with license or tax codes, or participating in license, tax, system, finance and accounting, or other project functions.

2. Serves as a resource and trainer to other specialists and performs duties such as doing or coordinating customer service activities with other work groups such as audit or marketing.

3. Performs a variety of day-to-day work load and planning duties and participates in team and bureau meetings, as well as process improvement, diversity, and other functions.

4. Performs internal and program related finance duties including preparation and analysis of journal entries and refunds; prepares and reconciles various program accounts such as the Multnomah County Business Income Tax (MCBIT) or Multnomah County Personal Income Tax (ITAX) and bureau accounts; prepares, analyzes, and enters invoices into the City's financial systems; and performs various fund transfers for revenue and expenditure activities, internal payroll and bureau financial functions and tasks.

5. Performs a variety of technical accounting services for and with other sections such as assisting in analyzing and correcting accounting discrepancies in deposit batches from operations; preparing reports and spreadsheets for senior management, other bureau staff members, or Multnomah County; assisting in

the preparation of financial reports; or in reviewing and processing local income tax returns.

6. Performs a variety of refund related activities such as: evaluating refund data, and processing and issuing refunds for overpayments; reviewing the accuracy of refunds authorized by the bureau; ensuring the refunds are properly entered and processed in a timely manner; and providing explanations concerning the status of refunds to others, such as bureau staff, other City or County offices, or the public.

7. Assists senior staff and auditors in review of State, Federal, City and County documents; enters business or tax information into the appropriate computer financial system; makes corrections and prepares billings and/or correspondence; verifies accuracy of data functions making corrections when needed; and recommends actions on penalty waivers, voluntary compliance, payment plans, or application of matters such as initial year adjustment policy.

8. Identifies accounts requiring attention using general guidelines and workload requirements; and organizes, prioritizes, and conducts field visits if necessary to business locations to perform collection, account management, or liaison duties.

9. Performs collection, account receivable or cash management related functions such as: gathering collection income information and payments; managing delinquent accounts and receivables to obtain payments and compliance; and working with taxpayers by responding to calls and explaining requirements and options, may assist in preparing documents for County or City Attorney's Offices.

10. May prepare accounts for court action by assessing presumptive fees or performing industry or like account comparisons.

11. Serves as team member for developing guidelines for collections giving input and explaining how process/steps impact workload and collection actions.

12. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

In addition to the Knowledge, Skills and Abilities of the Revenue and Tax Specialist Levels I, II and III the following are required at Level IV:

Knowledge of: city and county business license or tax codes, policies, laws, and accounting procedures; all corporation return elements.

Ability to: explain complex licensing, tax or business concepts, standards and practices; analyze tax or license documents for accuracy and compliance; maintain knowledge and skills in a changing tax environment; plan and coordinate complex business license or tax functions; serve as a resource and

assist in training other specialists; accurately update accounts for appropriate status, including exempt and out of business; perform complex business license and tax functions such as required for partnership and corporation returns, reviewing multiple year account activity to determine appropriate action or correspondence; perform math calculations and/or other accounting necessary to analyze returns and accounts; prepare persuasive, clear and concise oral, electronic, and written communications; problem solving; effectively communication with taxpayers and professional representatives such as, CPAs and attorneys, regarding compliance issues.

Skill in: performing bureau database searches for account and payment information; generating appropriate account correspondence; reviewing and analyzing tax returns or other documents, including accurate entry into the bureau computer system.

Special Requirements

Some assignments may require valid state driver license.

Classification History:

Adopted: 09-10-03
Created as part of the Bureau of Licenses Classification and Compensation Study 2-02 to 7-03
Revised: 07-13-04
June 2009 - Change Job Class number from 2233 to 30000194, due to system change.

Working Conditions

Work at this level is typically performed in an office and field environment. Incumbents are required to work outdoors in all weather conditions in and around traffic, to work alone in remote locations, and are exposed to angry and hostile persons at office and business locations.

Revenue and Tax Specialist – Lead - 30000195

Distinguishing Characteristics

The lead level of the revenue and tax series continues to function at an advanced journey level such as required for Level IV accounting and/or finance with the addition of temporary lead or temporary assignments to head up special projects in other sections of the bureau such as regulatory, finance, audit, operations, or marketing. This level may also continue to provide technical support in a variety of licensing, tax, and accounting functions. The Lead Level is distinguished from Level V, in that the lead level or lead project assignments are of a temporary nature. Duties recognize specialty functions and, depending on assignment, vary with business and tax cycles, and may involve operations, finance, and other related functions.

Note: This is a premium pay class for assignment of lead duties. Employees do not accrue seniority or obtain status in this class. Instead, employees are assigned from a base class, in which they retain status and accrue seniority.

Typical Duties/Examples of Work

Typical duties and examples of work shown below are intended to recognize that incumbents may be assigned to focus on operations, finance, or other areas that reflect the multiple functions in the bureau and cross-over general duties which may be common to these functions.

1. Provides lead direction to Revenue and Tax staff as formally assigned, including scheduling, coordinating, assigning, reviewing and overseeing the completion of a variety of work and/or projects; training other employees; and providing input to performance evaluations, as required. Assignments may include working on projects with regulatory, finance, audit, operations, marketing, other bureaus, agencies, and/or jurisdictions. Activities may be related to collections and account management, finance/accounting services, refunds, and reviewing tax documents from various jurisdictions to assist in setting program policy.

2. Provides lead direction to process improvement and diversity tool development teams.

3. Performs assigned data edits in database applications.

4. Serves as a liaison with staff, management, customers and the public to coordinate project work or resolve problems by providing appropriate reporting function.

5. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

In addition to the Knowledge, Skills and Abilities of the Revenue and Tax Specialist Levels I, II, III and IV, the following are required at the Lead Level:

Ability to: organize and prioritize project and regular workload; provide direction to coworkers assigned to project; train others in new or changed programs or processes; review work of coworkers for completeness and accuracy; manage projects; schedule and assign work to one or more coworkers assigned to the project; and communicate with supervisors and/or managers regarding project status and results.

Special Requirements

Some assignments may require valid state driver license.

Classification History:

Adopted: 09-10-03
Created as part of the Bureau of Licenses Classification and Compensation Study 2-02 to 7-03
Revised: 07-13-04
June 2009 - Change Job Class number from 2234 to 30000195, due to system change.

Working Conditions - Lead

Work at this level is typically performed in office and field environments. Incumbents are required to work outdoors in all weather conditions in and around traffic, to work alone in remote locations, and are exposed to angry and hostile persons at office and business locations.

Revenue and Tax Specialist V - 30000196

Distinguishing Characteristics

The top level of the revenue and tax series functions at a senior level with responsibilities in one of the following areas: on-going lead responsibilities and may be assigned to an industry-wide responsibility or program, or for coordinating a Business Improvement District (BID); or coordinating the Transient Lodging (TL) program and providing support to the Business License Appeals Board (BLAB) and to the Audit section, and may be assigned an industry-wide responsibility or program or coordination of a Business Improvement District (BID); or designated training officer for the bureau's permanent revenue and tax operations to include lead responsibilities for trainees; or senior level worker in the delinquent accounts collection section to include lead responsibilities over workers in the Collections Teams when they are working on difficult collection cases. Employees in this class may be assigned responsibility for special projects or designated financial and data edits that require specific and advanced BLIS and program knowledge. Level V is distinguished from Lead and IV levels, which are at an advanced journey level and are responsible for less complex business, tax analysis, negotiation, accounting, and process improvement, responsibilities than the V level. Level V is distinguished from the revenue auditor series, which is responsible for planning, organizing, and conducting revenue audits. Duties recognize specialty functions and, depending on assignment, vary with business and tax cycles and may involve operations, finance, and other related specialties.

Typical Duties/Examples of Work

Typical duties and examples of work shown below are intended to recognize that incumbents may be assigned to focus on operations, finance, or other areas that reflect the multiple functions in bureau and as well as to illustrate cross-over general duties which may be common to these functions. Any one position in this class may not perform all the duties listed below.

1. Provides lead direction to revenue and tax staff as formally assigned, including scheduling, coordinating, assigning, reviewing and overseeing the completion of a variety of work and/or projects; training or coaching other employees; and may provide input to performance evaluations.

2. Analyzes business returns; identifies calculation errors and omissions; completes forms with the correct data for billings, credits/refunds, and communications; identifies returns for audit review; and edits designated data that require specific and advanced computer application and system knowledge.

3. Coordinates and performs projects and account management such as testing new computer application modules in the Regulatory Section, Finance, or Operations Sections.

4. Facilitates and guides day-to-day specialty or team planning duties with responsibility for determining needs, developing team or functional training strategies, coaching; and participates in bureau meetings, as well as meetings concerning process improvement, and other related functions.

5. Assists taxpayers and their representatives with understanding general tax laws and financial calculations; and responds to questions and complaints about specific or general correspondence, and account data involving standard or complex matters.

6. Coordinates encourages, and enforces compliance with the Transient Lodging Tax program (TL) and performs duties such as: entering business licensing and tax information to the TL database; billing of TL accounts, collections and deposits of taxes; tracking and consultation with operators on program requirements; identifying problem accounts; organizing solutions in conjunction with the Auditor specialized in TL functions; and provides reports to the City of Portland, Multnomah County (MC Trust), or Portland Oregon Visitors Association (POVA).

7. Coordinates and works closely with Auditors to identify and track audited accounts; provides back up to the finance section in their accounting functions including deposits and reconciliation, timekeeping and accounts payable; serves as a resource on preparing and analyzing journal entries, refunds, payrolls, reconciliation of Multnomah County Business Income Tax (MCBIT) and bureau accounts, or on preparing, analyzing, and entering invoices into the City's financial systems.

8. Organizes and coordinates meetings of the Business License Appeals Board (BLAB) and performs duties such as: collecting and delivering materials; scheduling and providing clerical support for BLAB hearings; and coordinating meetings with bureau auditors and managers as well as Board members and appellants.

9. Coordinates and performs collection or account management program or multi-account planning, evaluation and analysis related functions such as developing improved procedures for reviewing and evaluating: collection income, payment histories, communications, guidelines for City Attorney referrals, and presumptive fee assessment; or like account comparison standards and procedures.

10. Manages advanced delinquent account collections activities; serves as primary contact point for legal counsel regarding collections in business licenses operations; reviews accounts and determines which accounts are referred to City Attorney's Office; writes up necessary documents for City Attorney; review affidavits and other documents written by the City Attorney; and may be called to testify in court; writes off uncollectable accounts; may manage and collect judgments received.

11. Designs and administers referral process of cases to the City Attorney, to include affidavit work and tying all charges in an account to a specific Code violation; may oversee cases referred to outside collection agencies and is

responsible for reporting judgments/delinquencies to credit reporting agencies; communicates and interacts with title companies and other financial institutions during collection of judgments and settlements.

12. Coordinates and reviews State, Federal, City and County documents; coordinates entry of business or tax information in the database system(s); verifies accuracy of data functions; and recommends actions on penalty waivers, voluntary compliance, payment plans, or application of policies such as initial year adjustments.

13. Organizes, leads, and conducts field visits to business locations to: coordinate and perform complex, sensitive, or priority collection, account management or liaison duties; or develop skills of colleagues in collection and account management functions.

14. Serves as a resource and trainer to other specialists; performs penalty waivers for staff members; sets up and coordinates customer service activities with other work groups such as the audit, marketing, the regulatory section, or other City functions or organizations.

15. Serves as designated training officer for the bureau's permanent revenue and tax operations; plans, designs, performs and updates training presentations and manuals; tracks and documents individual employee progress and reviews results with supervisors; makes recommendations to assist staff in meeting training requirements; suggests new training modules to meet ongoing and changing demands of bureau programs; and participates in the development of program processes and guidelines in order to incorporate into train modules; serves as lead coordinator for testing new computer system or application modules and functions.

16. Performs assigned financial and data edits in program database applications.

17. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

In addition to the Knowledge, Skills and Abilities of the Revenue and Tax Specialist Levels I, II, III and IV, the following are required at Level V:

Knowledge of: basic strategic planning concepts; project planning, budgeting, and administration; processing and collection strategies, methodologies, and practices; advanced knowledge of City and County business license or tax codes, policies, laws, and other Bureau revenue programs; advanced knowledge of bureau functions, rules, and procedures with ongoing mastery of bureau databases.

Ability to: increase project administration and management knowledge and abilities; function as a resource on recognizing and resolving the most complex issues in tax reports or other program documents; assist in establishing and maintaining program procedures; organize and prioritize team workload; organize and prioritize the workload and procedures for other Bureau revenue programs;

build teams and provide leadership; train coworkers in areas such as databases and systems, compliance issues, collections techniques and procedures, or other Bureau revenue programs; manage complex organization and industry issues such as mergers, acquisitions, bankruptcies, or dissolutions; support auditors in performing net operating loss analysis or amended return review; use advanced processing and collection strategies, methods and practices; review, understand, analyze and recommend corrections and changes to affidavits and other legal documents written by the City Attorney; manage the workload of team members assigned multiple accounts to meet court dates and other legal deadlines; and obtain compliance using collaboration, persuasive communications and tools such as payment plans, small claims proceedings and city attorney assistance.

Special Requirements

Some assignments may require valid state driver license.

Classification History:

Adopted: 09-10-03
Created as part of the Bureau of Licenses Classification and Compensation Study 2-02 to 7-03
Revised: 07-13-04
Revised: 03-20-08 FLSA designation changed to exempt
June 2009 - Change Job Class number from 2235 to 30000196, due to system change.

Working Conditions

Work at this level is typically performed in office and field environments. Incumbents are required to work outdoors in all weather conditions in and around traffic, to work alone in remote locations, and are exposed to angry and hostile persons at office and business locations.