

**County of Humboldt Job Specification**  
**SENIOR REVENUE AND TAX TECHNICIAN**  
**Classification 1136**  
**FLSA: Non-Exempt**



**DEFINITION**

Leads the work of Revenue and Tax Technicians; balances bank statements; makes daily investments and oversees transfers of funds in support of investment program; performs or oversees complex and varied office and field work, including identification of debts owed, assessment of debtor ability to pay, pursuit of legal enforcement measures, collection in full of amounts due, preparing monthly and annual collections reports, and responding to audit requests; performs related duties as assigned.

**SUPERVISION RECEIVED AND EXERCISED**

Receives direction from assigned supervisory or management personnel. Exercises technical and functional direction over and provides training to lower-level staff.

**CLASS CHARACTERISTICS**

This is the advanced-level classification in the Revenue and Tax Technician series responsible for performing the most complex work assigned to the series. Incumbents regularly work on tasks which are varied and complex, requiring considerable discretion and independent judgment. Positions in the classification rely on experience and judgment to perform assigned duties/ensure efficient and effective servicing function of the assigned program area. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to complete assignments. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements.

**EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

*Management reserves the right to add, modify, change, or rescind the work assignment of different positions.*

- Provides lead direction, training, and work review to a small technical and/or support staff; organizes and assigns work, sets priorities, and follows up as required; instructs staff in work procedures.
- Provides input into selection decisions, performance evaluations, and disciplinary matters.
- Monitors the daily work of Revenue and Tax Technician; serves as a resource for the handling of difficult situations; assists in solving problem situations pertaining to collections activities; performs routine and complex work associated with the investigation and collection of current and delinquent accounts.
- Prepares and manages the annual Chapter 7 auction of property tax defaulted parcels in accordance with state code.
- Assists in developing and modifying revenue recovery procedures.

- Coordinates County collection efforts with outside agencies, such as the Franchise Tax Board, Department of Motor Vehicles, law enforcement personnel, court personnel, other County departments, credit bureaus, and other collection agencies as necessary.
- Prepares reports for the County Auditor-Controller and Assessor, the Superior Courts, and the Judicial Council of California.
- Mails notices of excess proceeds; publishes and maintains list of excess proceeds claims.
- Types, proofs, and notarizes each tax deed on properties that are five years in default and sends them to the County Recorder to be recorded.
- Oversees wire transfers of funds in support of investment program.
- Oversees daily balancing of revenues; balances and/or reconciles monies collected by staff as required.
- Advises County departments and special districts about ledger and fund balances; verifies all monies received and receipted.
- Resolves and communicates answers to questions from investment firms, other governmental agencies, title companies, and real estate brokers.
- Records and/or analyzes investments and produce records and reports; maintains accurate records and files of work performed.
- Performs related duties as assigned.

*Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.*

### **QUALIFICATIONS**

*The requirements listed below are representative of the knowledge and ability required.*

#### **Knowledge of:**

- Principles of providing functional direction and training.
- Principles, procedures, and techniques of public agency investment and cash management.
- Principles, procedures, techniques, and sources of information related to collections and credit investigation work.
- Basic accounting and financial record keeping principles and practices.
- Business letter writing and the standard format for typed materials.
- Business arithmetic.
- Techniques for interacting with the public, often in situations which may be difficult or confrontational.
- Revenue generating strategies and customer complaint resolution.
- Court procedures related to collections.
- Techniques for providing a high level of customer service by effectively interacting with the public, vendors, contractors, and County staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.
- Tax and revenue codes, licensing, and business permit regulations.

- Laws, regulations, ordinances, and codes related to the legal collection of debts, probate, seizure of property, real property transactions, credit investigation work, and bankruptcy.
- Prepare and maintain a variety of financial and statistical reports, records, journals, and files.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks
- Sources of information available in skip-tracing and collection work.
- Principles, procedures, systems, and methods of recordkeeping principles and procedures; and filing systems and methods.
- Current collection and legal procedures applicable to the collection of delinquent accounts.
- Principles, practices, and techniques used in interviewing to obtain information.
- Types of delinquent and receivable accounts.
- Collection, billing, claiming, and third-party eligibility procedures.

**Ability to:**

- Plan, organize, and coordinate the work of assigned staff.
- Effectively provide staff leadership and work direction.
- Assist in developing and implementing goals, objectives, practices, policies, procedures, and work standards.
- Assign, direct, and review the work of others and instructing others in work procedures.
- Organize and maintain accurate revenue and collection records and files.
- Make accurate arithmetic calculations.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to completion of the twelfth (12<sup>th</sup>) grade

**and**

Two (2) years of experience in revenue and tax collections or in public agency investments at a level equivalent to the County's class of Revenue and Tax Technician.

### **Licenses and Certifications:**

- Must possess a valid US driver's license upon date of application. Must obtain California driver's license following hire date per California DMV regulations.

### **PHYSICAL DEMANDS**

- Mobility to work in a standard office setting and use standard office equipment, including a computer; primarily a sedentary office classification although standing in work areas and walking between work areas may be required; occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information; ability to lift, carry, push, and pull materials and objects up to 10 pounds.
- Vision to read printed materials and a computer screen.
- Hearing and speech to communicate in person and over the telephone.
- Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment.

### **ENVIRONMENTAL CONDITIONS**

- Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.
- Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

### **ADDITIONAL REQUIREMENTS**

- Some departments may require pre-employment screening measures before an offer of employment can be made (i.e., background screening, physical examination, etc.).