

## TAX AND LICENSE SPECIALIST II

### JOB DESCRIPTION

**Classification Responsibilities:** A Tax and License Specialist II works in either Revenue Collections or Tax Audit and Collections dealing directly with customers in person and over the phone.

**Revenue Collections Assignment:** A Tax and License Specialist II is responsible for dealing directly with customers in person and over the phone to assist them with City business licenses. This involves: educating and assisting the public in obtaining the type(s) of licensing required by the City; interpreting City of Mesa codes, ordinances, and policies regarding the various licenses and explaining to the customers; checking applications for completeness and proper zoning; receiving and processing fees through the cashier system; and processing tax returns. This classification is responsible for processing licenses for a wide variety of businesses including massage establishments, auctioneers, second-hand stores, pawnbrokers, special events, liquor licenses, etc. These licenses involve detailed work such as: sending applications to numerous departments (Police, Planning & Zoning, City Attorney, etc.) for approval; preparing posting information indicating Council review; completing packet for Council agenda and submitting to the City Manager's office; preparing Council recommendations and returning them to the State Department of Liquor; monitor the State's approval status; track and send yearly renewal letters to licensees; and complete balancing of various licensing fees to the general ledger. In addition, this classification is responsible for the accounts receivable which includes: posting payments; reversing, waiving, and correcting billings to the taxpayers; creating journal vouchers for the movement of money between various general ledger accounts; and monthly balancing of the accounts receivable to the general ledger. This class is responsible for training lower level staff, acting as a lead in the supervisor's absence, and is expected to handle day-to-day decisions with a greater degree of independence by carrying out assignments without detailed instruction or guidance. This class performs related duties as required. This class is supervised by a Revenue Collections Supervisor who reviews work through conferences, reports, and results achieved.

**Tax Audit & Collections Assignment:** A Tax and License Specialist II is responsible for working with the audit and collection staff to assure that documentation is done correctly and timely in accordance with City and State tax codes to protect the City's interest in tax related issues. This includes: following detailed procedures in issuing and tracking a variety of assessments from the initial mailing through the payment or setup of funds due to the City; issuing license fees due and setting up the fees in accounts receivable; processing tax returns received without payment; processing the filing and releasing of liens; manually comparing utility, accounts payable, and credit card refund lists to sales tax accounts receivable to capture money due to the City; and processing return mail and returned checks. This classification is responsible for answering the accounts receivable telephone which requires a thorough understanding of the City of Mesa accounts receivable system, the ability to educate taxpayers on proper reporting procedures, and assisting with corrections when needed; which includes: reversing, waving, and correcting billings to the taxpayers; creating journal vouchers for the movement of money between various general ledger accounts; and monthly balancing of the accounts receivable. In addition, this classification administers the collection of vehicle use tax due to the City. This includes: uploading information from the State, mailings, posting payments, responding to telephone calls, making assessments, filing and releasing liens, and recommending write-off when uncollectable. This class is responsible for training lower level staff, acting as a lead in the supervisors absence, and is expected to

handle day-to-day decisions with a greater degree of independence by carrying out assignments without detailed instruction or guidance. This class performs related duties as required. This class is supervised by the Tax Coordinator who reviews work through conferences, reports, and results achieved.

**Distinguishing Features:** The public contact component of this classification involves: explaining and/or interpreting the City's policies and procedures, answering complex questions, and resolving customer and/or citizen problems and complaints. This includes interacting with citizens who are often angry, confused, and/or hostile. Employees in this class are expected to perform day-to-day activities independently within established guidelines and procedures under general supervision. This class is distinguished from the Tax and License Specialist I by the greater degree of independence in handling day-to-day decisions, and in the lower amount of direct supervision received. Employees may progress to this classification by noncompetitive promotion after successful completion of at least one year as a Tax and License Specialist I, meet the specific criteria-based promotion requirements, and meet the minimum qualifications of the Tax and License Specialist II classification. This class is FLSA nonexempt.

## QUALIFICATIONS

**Employee Values:** All employees of the City of Mesa are expected to uphold and exhibit the City's shared employee values of Knowledge, Respect, and Integrity.

**Minimum Qualifications Required.** Any combination of training, education, and experience equivalent to graduation from high school or GED. A minimum of four years experience performing increasing responsible administrative work including proficiency with word processing and other computer software applications. A minimum typing speed of 35 *net* words per minute (nwpm) is also required and will be verified prior to employment or promotion to this class.

**Special Requirements.** None.

**Substance Abuse Testing.** None.

**Preferred/Desirable Qualifications.** Experience in accounting and/or bookkeeping is highly desirable.

## ESSENTIAL FUNCTIONS

**Communication:** Communicates with the general public, other City employees, management, and contractors to respond to questions, obtain and provide information, and explain and interpret rules, regulations, practices, and policies. Prepares correspondence, reports, and agendas with clearly organized thoughts and using the proper sentence construction, punctuation, and grammar, in order to correspond with the public and produce reports and agendas for management. Exchanges information with county and state agencies and other local governing bodies regarding procedures, policies, and code requirements. Provides customers with handouts such as: license applications, related copies of the code, information sheets, sales tax new business listings, a Guide to Opening a Business booklet, and tax collection schedule. Coordinates checkouts with other governmental agencies and City departments. Trains clerical staff through on-the-job training regarding: office procedures, Mesa City Code, Model City Code, and the Arizona Department of Liquor Licenses and Control rules and regulations. Interacts

in a tactful, confidential, knowledgeable, and courteous manner with customers who are angry, confused, and/or hostile.

**Manual/Physical:** Processes liquor license applications upon receipt from the Arizona Department of Liquor. Operates a variety of standard office equipment such as a copy machine, personal computer (PC), microfiche printer and/or reader, and a ten-key calculator. Processes applications for general and business licenses, including: auctioneering, bingo, carnival, circus or tent show, fireworks, fortune telling, going out-of-business, park and swap, pawnbroker, peddler, revival, sale of jewelry at public auction, shooting gallery, teenage dance hall, sex-oriented business, and massage therapy establishments. Works with fingerprinting ink and cleaning fluids when fingerprinting general licensing applicants and/or the general public. Uses a PC to: enter spreadsheet information; input credit and billing information; complete on-line transactions; and produce memos, letters, other correspondence, and reports. Enters narrative and numerical information into a computerized billing system to update tax and licensing account records. Sorts and distributes mail and computer reports to evenly divide workload among staff in the Licensing Office. Assists in balancing cash drawers. Completes the Daily Cash Report and processes deposits for the City. Meets scheduling, attendance, accuracy, and reliability requirements.

**Mental:** Plans and organizes the activities of issuing regulatory licenses, liquor licenses, and tax licenses. Learns job-related material through on-the-job training regarding changes in policy and procedure, updated office equipment, and public contact skills, in order to utilize these skills in a production environment. Prioritizes own work involving all job functions within the specific department. Interprets the Arizona state statutes, City code, and Model City code to inform the public of licenses required for business operations. Performs statistical computation on audit assessments, and for penalty and interest bills and reports. Learns to comprehend all the computer screens and/or software programs specific to the Licensing Office. Comprehends written and oral requests and/or complaints from customers in order to properly investigate and resolve the issue in question, and make corrections to customer accounts. Attends to details so that work product is within acceptable limits for accuracy and timeliness.

**Knowledge and Abilities:**

Knowledge of:

PC software applications; and  
computer applications related to this assignment.

Ability to:

compile data for special and periodic reports;  
maintain complex records and prepare accurate reports from such records;  
interpret and make decisions conforming to regulations and policies;  
anticipate changes in the priorities of tasks or volume of work to be accomplished and make necessary adjustments;  
establish and maintain effective working relationships with management, coworkers, and the public; and  
respond appropriately to public inquires and present a positive public image.

The duties listed above are intended only as general illustrations of the various types of work that may be performed. Specific statements of duties not included does not exclude them from the position if the work is similar, related, or a logical assignment to the position. Job descriptions are subject to change by the City as the needs of the City and requirements of the job change.

Revised to Update Distinguishing Features 11/15

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INCREMENTS 62-200

PAY GRADE: 42

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