

City of San José
CLASS SPECIFICATION

TITLE: INVESTIGATOR COLLECTOR I

CLASS CODE: 1272		
DEPARTMENT: Finance	ACCOUNTABLE TO: Senior Investigator Collector	FLSA STATUS: Non-exempt

CLASS SUMMARY: Performs entry-level work related to the collection of revenues owed to the City of San José including taxes (such as business license taxes); fees (such as fire permit fees); general accounts receivable, and other related revenues. Performs routine municipal tax return audits of businesses and individuals; enforces municipal revenue-related codes through field investigation, provides customer service over-the-counter, testifies in court; and updates computer systems for accurate revenue tracking.

DISTINGUISHING CHARACTERISTICS:

This is the first level classification in the Investigator Collector series. Incumbents of this class work in the field or in the office to identify and collect revenues owed the City under municipal codes, ordinances and resolutions. Incumbents may issue citations once they have completed any state required training. Incumbents represent the organization before Municipal Court and the Appeals Hearing Board. Initially, supervision and training are given in detail, but as an incumbent becomes more capable, he/she works with a higher degree of independence. This class differs from that of an Investigator Collector II in that the incumbents of the latter perform investigation and collection of more complex tax returns and revenues, and may act as a lead to incumbents of this classification.

QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education, experience, knowledge, skills, and abilities sufficient to satisfactorily perform the duties of the job may be substituted.)

Education and Experience

Two (2) years of undergraduate course work from an accredited college or university (equivalent to 60 semester units or 90 quarter units) and two (2) years of experience dealing with the public in enforcement, inspection, investigation, or customer service..

Licenses and Certification Requirements

Valid California Driver's License (Incumbents may be required to use their personal vehicles in performing the job duties.)

Minimum Knowledge, Skills and Abilities (position requirements at entry and depending on area of assignment):

- Knowledge of basic mathematics.
- Knowledge of business English, spelling, grammar and basic report writing
- Knowledge of basic principles of municipal tax auditing.
- Experience in using computers and applicable software.
- Knowledge of basic business law, bookkeeping methods, general office practices and principles.
- Ability to read sufficiently to comprehend legal procedures and legal terminology used in investigation and collection of revenues.
- Ability to read sufficiently to comprehend taxation principles and collection methods and procedures.
- Ability to read sufficiently to comprehend Small Claims procedures.
- Good oral and written communication skills in order to interact with coworkers, management, the general public, the court system, etc. sufficient to exchange or convey information and obtain compliance with municipal codes, ordinances and resolutions.

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- Ability to read sufficiently to comprehend applicable ordinances, codes, laws, rules and regulations.
- Ability to express oneself clearly and concisely both orally and in writing.
- Ability to persuade compliance by expressing oneself clearly, forcefully, and accurately.

Desirable Qualifications (likely to contribute to more successful job performance; can often be learned on the job):

- Ability to read sufficiently to comprehend rules and regulations concerning the issuance of citations.
- Ability to read sufficiently to comprehend pertinent City codes and ordinances and ability to interpret and apply them accurately.
- Knowledge of principles of municipal tax auditing.
- Ability to enforce the levying and collection of fees equitably and thoroughly in assigned areas.
- Ability to research legal, financial and other records to obtain data needed to enforce debt collection, recommend refunds or exemptions from payment of taxes.
- Ability to compose clear and concise reports and correspondence.

DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FRE-QUENCY
1.	Collects routine tax returns and revenues such as business tax.	10%
2.	Collects and reviews delinquent tax returns by collecting taxes, explaining the legal obligations related to tax payments, assisting debtors in establishing payment plans.	10%
3.	Conducts field investigations at businesses and residences of unpaid and delinquent City taxes, fees and other City accounts receivable in order to enforce municipal codes.	10%
4.	Provides customer service over-the-counter to applicants and business owners by communicating tax requirements and interpreting applicable City ordinances. Registers businesses for applicable taxes or other permits.	10%
5.	May issue citations when there are code infractions resulting in possible prosecution in municipal court; researches and prepares cases for prosecution. Represents the City and testifies in municipal court to enforce code compliance.	5%
6.	Assists with audits of financial and operational records of businesses.	15%
7.	Approves and records relevant tax data updates into computer systems that track tax and revenue collections.	10%
8.	Coordinates with the Information Technology Department to obtain improvements for revenue collection tracking computer systems. (i.e., assists in strategy formulation for automation, customization of reports, and interface with other systems) and updates legal log books.	5%
9.	Conducts research and analysis by analyzing work flow studies, revising forms, filing systems and individual work procedures.	5%

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10.	Summarizes financial data from departmental contracts and monitors the contractual obligations and conditions.	5%
11.	Surveys commercial mixed-use, annexed, and bare land parcels (classifying the nature of the parcel and identifying any water meters serving the parcel) in order to ensure accurate billing of the business tax program.	10%
12.	Organizes and participates in public outreach programs to the business community.	5%
13.	Performs other duties of a similar nature or level.	As Required

PHYSICAL REQUIREMENTS (Check all that apply to performance of the essential duties of the job)

	Climbing		Kneeling		Crawling
	Balancing		Lifting		Reaching
	Stooping	X	Fingering	X	Standing
X	Talking		Grasping	X	Walking
X	Hearing		Feeling		Pushing
	Crouching				

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

CLASSIFICATION HISTORY

Revised 11/03; s001
Formerly Titled Investigator Collector