

JOB DESCRIPTION

Benchmark Job #104

Ministry: Finance and Corporate Relations
Branch: Revenue Administration
Location: Victoria

Working Title: **Accounts Receivable Adjuster**
Level: Range 15
Classification: Clerk

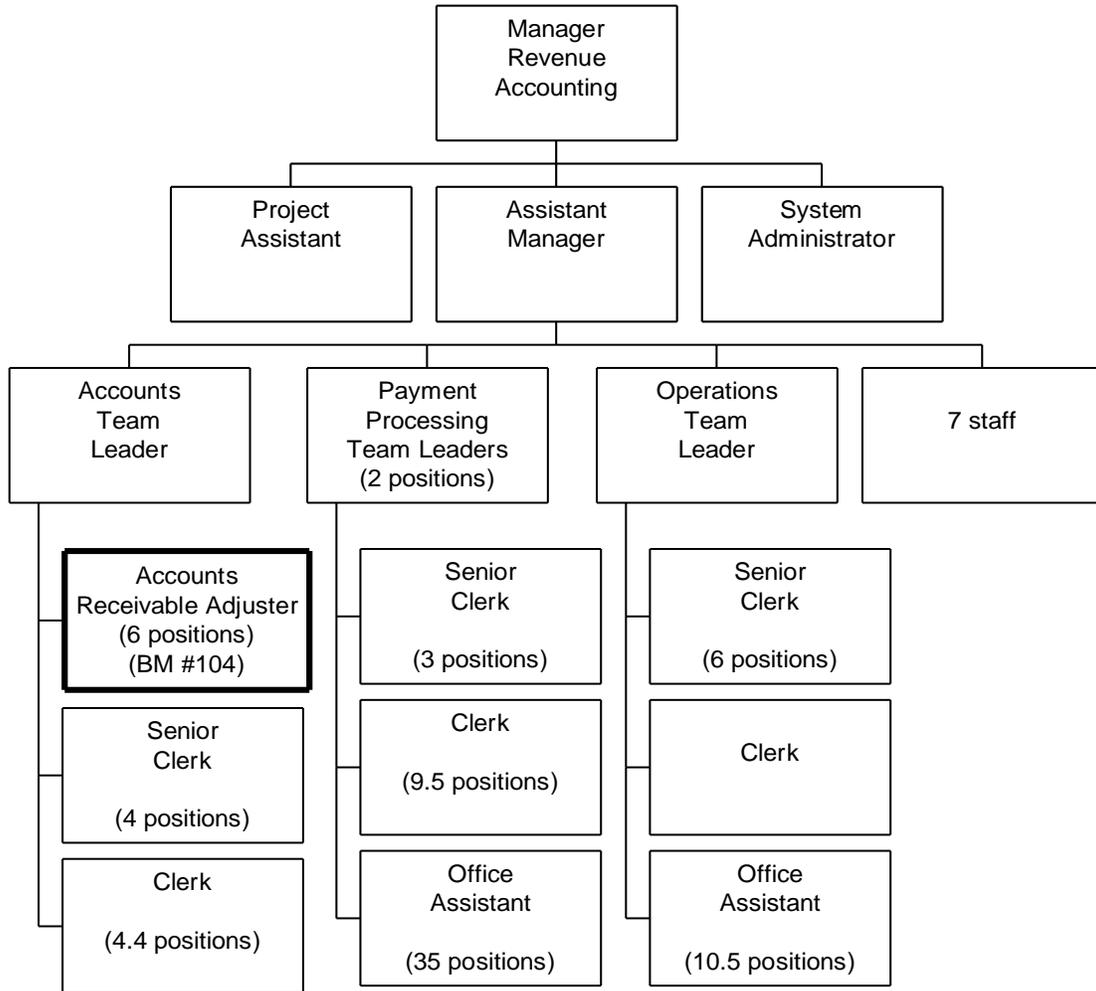
PRIMARY FUNCTION

To determine tax adjustments under the Social Services, Hotel Room, Tobacco and Motor Fuel Tax Acts affecting four accounting ledgers.

JOB DUTIES AND TASKS

1. Examines tax accounts on which an adjustment may be warranted
 - a. receives financial records, account information, correspondence, Consumer Taxation Branch inspection/audit reports and communications from taxpayers, collectors, Auditors, lawyers or trustees of receivership/bankruptcy
 - b. extracts information from processed batches or Revenue Operations financial ledgers
 - c. contacts government/bank personnel and tax debtors to clarify details
 - d. ensures supporting documentation exists and is accurate, complete and related to the appropriate transaction
 - e. receives computer output which reports possible account errors and duplications
 - f. re-calculates historical calculations based on new information for periods of up to six years to rework debt back to initial date and work forward to the current date to ensure the account correctly reflects all transactions
2. Adjusts tax accounts to provide accurate statement of amounts payable or receivable
 - a. enters data into the Accounts Receivable, Credit and Returns Ledgers and/or the Account History Database
 - b. initiates invoices, assessments and credit statements and forwards requests for refunds to other Branch
 - c. waives assessed penalties, interest and disallowed commissions up to \$1000 and recommends waiver of greater amounts
 - d. reviews correspondence received from taxpayers and responds by delaying tax payments, amending tax returns or reallocating or redirecting payments
 - e. generates statements and notices describing to the tax payer what action has transpired on their account
3. Performs other related duties
 - a. explains tax revenue policies and procedures to vendors, clients or financial representatives for compliance purposes
 - b. participates in the formulation of new policies and procedures for the assessment unit
 - c. transfers financial information into standard schedule and summary formats for debtors and accountants
 - d. provides formal training to new employees on accounts receivable procedures and policy
 - e. maintains statistics such as number of adjustments completed and pending and number of phone calls received

ORGANIZATION CHART
Benchmark Job #104



REASON FOR CLASSIFICATION

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Job Title: Accounts Receivable Adjuster

FACTOR NO.	REASON FOR CLASSIFICATION	DEGREE	CLASS. POINTS
1	<p>JOB KNOWLEDGE Understand and apply the accepted methods of accounts receivable to examine the history of tax accounts, do recalculations of tax owed including fees and commissions to determine the adjustments and amend the appropriate ledger(s).</p>	E	145
2	<p>MENTAL DEMANDS Judgement to assess financial information provided by tax payers or other division staff and choose an approach using a combination of accepted financial procedures to recalculate the tax owed, penalties, interest and disallowed commissions.</p>	D	100
3	<p>INTERPERSONAL COMMUNICATION SKILLS Discretion required to exchange information needing an explanation of tax revenue policies and practices for compliance with tax requirements with vendors, clients or financial representatives.</p>	C	30
4	<p>PHYSICAL COORDINATION AND DEXTERITY Moderate coordination and dexterity required to use computer and numeric keypad to examine accounts and calculate adjustments with some speed to meet deadlines.</p>	C	15
5	<p>RESPONSIBILITY FOR WORK ASSIGNMENTS Guided by general procedures or instructions, selects alternative course of action to examine the history of the account, do recalculations of tax owed including fees and commissions to determine and make appropriate adjustments to the account and the ledger(s).</p>	D	75
6	<p>RESPONSIBILITY FOR FINANCIAL RESOURCES Moderate financial responsibility to waive penalties, interest and disallowed commissions up to \$1000 per transaction using well defined criteria.</p>	D	22.5
7	<p>RESPONSIBILITY FOR PHYSICAL ASSETS/INFORMATION Significant responsibility to control the quality of information by changing historical data which affects the legal status of the taxpayers account and amount owed to the province.</p>	D	22.5

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FACTOR NO.	REASON FOR CLASSIFICATION	DEGREE	CLASS. POINTS
8	RESPONSIBILITY FOR HUMAN RESOURCES Responsibility to provide formal training to new employees on accounts receivable procedures and policy.	B	9
9	RESPONSIBILITY FOR WELL BEING/SAFETY OF OTHERS Moderate care and attention to waive penalties that affect the financial well-being of taxpayers.	C	15
10	SENSORY EFFORT/MULTIPLE DEMANDS Focused attention to detail to frequently visually examine financial records.	C	12
11	PHYSICAL EFFORT Moderate physical effort to frequently focus visual attention to view computer screens and printed material to examine financial records.	C	12
12	SURROUNDINGS Exposure to regular unpleasant dealings with people upset about their tax accounts.	B	4
13	HAZARDS Limited exposure to hazards from frequent keyboarding.	B	4

Total Points: 466

Level: Range 15