

**OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF PERSONNEL**

BUSINESS SERVICES SPECIALIST

Position Code: K1196

DISTINGUISHING FEATURES OF THE CLASS

Under general direction, performs highly technical/complex and professional work; examines, evaluates and processes corporate applications and documents submitted by business entities to assure compliance with state laws; performs complicated calculations to determine proper payment of fees and taxes; work involves independent research, analysis and interpretation to determine whether documents should be filed or rejected for non-compliance; communicates with attorneys, corporate representatives and the public concerning the filing of documents and reasons for objections to files; does related work as required, which includes various clerical functions for the official filing of technical documents which comply with the applicable statutes; enters information via computer format; no supervisory responsibilities, but may provide guidance to lower level staff; works with moderate latitude in the use of initiative and independent judgment; is given the general objective for each assignment and is expected to accomplish tasks utilizing established policy and procedures.

ILLUSTRATIVE DUTIES AND RESPONSIBILITIES

Typical duties include, but are not limited to, a combination of functions as defined in the lower level of this series AND such responsibilities as:

1. Researches, reviews, analyzes and interprets complex documents of foreign and domestic business entities submitted to be filed and recorded, including mergers and other intricate documents; researches and analyzes past reports and records, identifies errors; determines, interprets and applies **statutes**, rules and policies applicable to a given document in order to insure sufficiency to make a filing decision; explains procedures for processing; investigates errors or delays in processing of applications and initiates corrective action; exercises independent judgment in making corrections to errors; uses computer system to obtain information and to perform a variety of functions including various entries, changes, transfers, verifications, account adjustments and other corrections; exercises discretion resolving conflicts; provides detailed reports substantiating findings, as needed; processes complex requests for services and information, as assigned.
2. Examines and evaluates data to determine business eligibility or liability; approves, rejects or suspends filing documents, identifies insufficiencies; searches records in order to secure information and investigate problems or questionable data concerning documents previously filed and recommends solutions as necessary; produces appropriate evidence of documents previously filed and recommends solutions as necessary; produces appropriate evidence of document filing; answers difficult questions and resolves problems and situations.

BUSINESS SERVICES SPECIALIST (Continued)

3. Prepares detailed, complex correspondence for notification of statutory reasons for objecting to filing; researches, explains and interprets the requirements of corporate/business laws to attorneys, corporate officials or the general public; informs concerned parties of decision and rights of appeal; compiles, prints and distributes reports, as required; may provide information and assistance to the public on department programs and procedures
4. Performs accounting tasks and/or mathematical calculations relative to difficult or complex corporate fees, including proration of taxes and computation of interest and penalties; determines and collects appropriate fees for documents; examines accounts and records and computes taxes owed according to prescribed rates, laws and regulations.
5. May serve as lead worker in specialty area; assists in training new employees **in** the methods and procedures of the division by demonstrating, closely observing, monitoring and if necessary making constructive suggestions to verify the accuracy of work produced; takes the lead in the absence of the supervisor by assigning, reviewing and approving routine and special work assignments; answer questions from less experienced employees pertaining to analyzing documents, data entry procedures or substantive filing requirements; may assist with administrative duties of the division.
6. May participate in or draft recommended changes in laws; reviews, examines **and examines** and evaluates purpose and content of procedures, as assigned; evaluates findings; makes recommendations for establishment of new or modified method to improve operations; may draft instructions concerning generation, completion and distribution of specific information according to new or revised practices, procedures or policies of management.
7. Receives and responds to complex, technical phone calls to answer customer inquiries about business entities using information in computer records, including determining availability of proposed corporation names; resolves potential cases of conflict and ensures that rejections are justified; provides detailed information on fees filing procedures, specific requirements of applicable laws, rules, regulations and department policies.
8. Assists walk-ins with difficult filings of foreign and domestic corporation documents; **must** know when to reject a filing and write rejection forms; may prepare cover letters, cash receipts and record fee payments on transmittals, notate checks received daily.
9. Performs other duties as required or assigned.

BUSINESS SERVICES SPECIALIST (Continued)

REQUIREMENTS:

Education and Experience

Requires knowledge, skill and mental development equivalent to completion of four years of college preferably with course work in finance, accounting, economics, taxation, mathematics, pre-law, business administration or a related fields PLUS two years of progressively responsible professional experience such as would be gained as a Business Services Representative. Any Combination of related education and professional experience in the identified fields may be substituted for the requirement.

Knowledge, Skills and Abilities

Requires thorough knowledge of accounting principles and procedures; business practices and terminology.

Requires extensive knowledge of effective means of communications, Business English, grammar, spelling and arithmetic including percentage calculations.

Requires working knowledge of modern office methods, practices, procedures and equipment, which may be applicable to the work situation.

Requires working knowledge of approved modern filing systems, workflow, methods and the limits of their utility.

Requires skill in the use of computer terminals to enter and extract data.

Requires skill in analyzing tax documents and records to determine liability.

Requires ability to understand, interpret, apply and explain statutes, regulations, and financial statements; examine tax statements; maintain files and accounting records; ability to make independent decisions based on procedures and statutes; ability to analyze problems and situations and to take necessary corrective action.

Requires ability to compile and analyze difficult or complex financial and statistical data, and prepare concise, conclusive reports from such information; ability to compose and type detailed correspondence in the course of official duties; ability to maintain an expected workflow while sustaining a high level of accuracy and thoroughness

Requires ability to perform difficult accounting calculations and compute fees; ability to handle fast –paced environment; ability to conform to deadlines.

Requires ability to communicate well with coworkers and to develop and maintain effective working relationships with others; ability to deal with public on phone and **n** person; ability to express ideas clearly and concisely, both orally and in writing.

Approved by the Secretary of State Merit Commission – February 11, 1998
Effective – March 1, 1998