

JOB INFORMATION

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| Job Code | KA48 |
| Job Description Title | Mgr, Tax Rptg & Compliance |
| Pay Grade | FO13 |
| Range Minimum | \$83,900 |
| 33rd % | \$106,270 |
| Range Midpoint | \$117,460 |
| 67th % | \$128,640 |
| Range Maximum | \$151,010 |
| Exemption Status | Exempt |
| Approved Date: | 1/1/1900 12:00:00 AM |
| Legacy Date Last Edited | 11/17/2022 |

JOB FAMILY AND FUNCTION

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|---------------|---------------------------------|
| Job Family: | Financial & Business Operations |
| Job Function: | Tax |

JOB SUMMARY

The Manager of Tax Reporting & Compliance ensures that Auburn University and Auburn University-Montgomery are in compliance with Internal Revenue Service and applicable states' Departments of Revenue rules and regulations. This includes ensuring sales, excise, unrelated business income as well as foreign persons' payment withholdings are properly withheld, reported, and remitted, if applicable. This position is also responsible for properly coding non-US citizen status as well as ensuring scholarships and awards are coded to properly report on 1098T or 1099.

RESPONSIBILITIES

- Oversees and ensures the preparation of university tax forms, including proper reporting of amounts paid to foreign persons (1042-S), information on tax exempt private activity bond issues (8038), applicable state sales, excise (720), and unrelated business income taxes (990T). Coordinates and reviews the preparation of other Internal Revenue Service and State filings and records for the department.
- Directs and oversees departmental operations relating to non-US citizen taxes and payment including, but not limited to, determination of individuals' tax status, performance of substantial presence test/treaty analysis, coding of taxes/treaty benefits, and determination of tax on athletic and educational scholarships.
- Analyzes, processes, and assesses taxes (when applicable) on all payments made through Procurement and Business Services for Auburn University and Auburn University-Montgomery; approves non-US vendors registries.
- Reviews new donor agreements processed through IssueTrak. Identifies language that may be problematic for tax purposes. Provides revised language as well as advises Development on potential tax issues.
- Oversees the review of scholarship/fellowship payment requests routing directly to Student Financial Services. Meets periodically with Scholarship Office personnel for quarterly updates. Ensures student payments are properly classified as scholarship/fellowship, award, or compensation, as applicable.
- Supervises the monitoring of tax-exempt bond compliance.
- Tracks new and existing laws related to taxes and immigration to ensure the university's compliance. Implements new policies and procedure relating to the new laws.
- Manages the training and communication of tax related issues, including payment to students.
- Collaborates with other departments on tax issues.
- Reviews immigration documents provided by employees to determine legal dates of work authorization needed for HR review and I-9 purposes.

SUPERVISORY RESPONSIBILITIES

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|----------------------------|---|
| Supervisory Responsibility | Full supervisory responsibility for other employees is a major responsibility and includes training, evaluating, and making or recommending pay, promotion or other employment decisions. |
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MINIMUM QUALIFICATIONS

To be eligible, an individual must meet all minimum requirements which are representative of the knowledge, skills, and abilities typically expected to be successful in the role. For education and experience, minimum requirements are listed on the top row below. If substitutions are available, they will be listed on subsequent rows and may only be utilized when the candidate does not meet the minimum requirements.

MINIMUM EDUCATION & EXPERIENCE

| Education Level | Focus of Education | | Years of Experience | Focus of Experience | |
|-----------------|---|-----|---------------------|--|--|
| Master's Degree | Must have a Master's in Accounting or related Business degree | and | 6 years of | Experience in tax law compliance, specifically in the preparation, review and submission of tax forms. At least 1 year experience in international tax law compliance. At least 1 year experience supervising, leading or mentoring other full-time employees. | |

MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of Internal Revenue Code and Laws, Auburn University policies and procedures, accounting and budgeting principles, and the analysis of financial data.

MINIMUM LICENSES & CERTIFICATIONS

| Licenses/Certifications | Licenses/Certification Details | Time Frame | Required/Desired | |
|-----------------------------------|--------------------------------|------------|------------------|--|
| Certified Public Accountant (CPA) | | Upon Hire | Required | |

REQUIRED PRE-EMPLOYMENT/ONGOING SCREENINGS

Financial History Check

PHYSICAL DEMANDS & WORKING CONDITIONS

Physical Demands Category: Other

PHYSICAL DEMANDS

| Physical Demand | Never | Rarely | Occasionally | Frequently | Constantly | Weight |
|-------------------------------|-------|--------|--------------|------------|------------|--------|
| Standing | | | X | | | |
| Walking | | | X | | | |
| Sitting | | | | X | | |
| Lifting | X | | | | | |
| Climbing | | X | | | | |
| Stooping/ Kneeling/ Crouching | | | X | | | |
| Reaching | | | X | | | |
| Talking | | | | X | | |
| Hearing | | | | X | | |
| Repetitive Motions | | | | X | | |
| Eye/Hand/Foot Coordination | | | | X | | |

WORKING ENVIRONMENT

| Working Condition | Never | Rarely | Occasionally | Frequently | Constantly |
|------------------------|-------|--------|--------------|------------|------------|
| Extreme cold | | X | | | |
| Extreme heat | | X | | | |
| Humidity | | X | | | |
| Wet | | X | | | |
| Noise | | X | | | |
| Hazards | | X | | | |
| Temperature Change | | X | | | |
| Atmospheric Conditions | | X | | | |
| Vibration | | X | | | |

Vision Requirements:

Ability to see information in print and/or electronically.