



Career Service Authority

Tax Technician II

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GENERAL STATEMENT OF CLASS DUTIES

Performs full performance paraprofessional work coordinating and administering complex tax compliance functions, executes direct licensing and registration of businesses for tax reporting and compliance, and acts as a lead worker.

DISTINGUISHING CHARACTERISTICS

This class performs full performance paraprofessional work coordinating and administering complex tax compliance functions. This class is distinguished from a Tax Technician I class that performs full performance technical work in one or more of the following areas: 1) provides assistance and information to multiple stakeholders on taxation law, rules, regulations, compliance procedures, and specialized programs, 2) performs tax lien, tax redemption, and tax lien sale functions, 3) provides specialized and technical support work for Tax Revenue Agents, Treasury Agents, and Tax Auditors, 4) performs payment positing, tax return filings, and adjustments to individual taxpayer accounts in accordance with state statute or city municipal code. Additionally, the Tax Technician II class is distinguished from the Tax Analyst that researches, analyzes, prepares, and processes claims for payments of outstanding taxes owed to the city.

Guidelines, Difficulty and Decision Making Level:

Guidelines are generally but not always clearly applicable, requiring the employee to exercise judgment in selecting the most pertinent guideline, interpret precedents, adapt standard practices to differing situations, and recommend alternative actions in situations without precedent.

Duties assigned are generally complex and may be of substantial intricacy. Work assignment is performed within an established framework under general instructions but requires simultaneous coordination of assigned functions or projects in various stages of completion.

Employee is responsible for determining time, place, and sequence of actions to be taken. Unusual problems or proposed deviations from guidelines, practices, or precedents may be discussed with the supervisor before being initiated.

Level of Supervision Received and Quality Review:

Under general supervision, the employee receives assignments and is expected to carry them through to completion with substantial independence. Work is reviewed for adherence to instructions, accuracy, completeness, and conformance to standard practice or precedent. Recurring work clearly covered by guidelines may or may not be reviewed.

Interpersonal Communications and Purpose:

Contacts are of a remedial nature involving the resolution of problems and where some degree of discretion and judgment are required in carrying out a major program and/or function of the organization.

Level of Supervision Exercised:

Performs permanently assigned lead work.

ESSENTIAL DUTIES

Performs direct licensing and registration of businesses for tax reporting and compliance and collects tax licensing payments.

Coordinates compliance efforts with Tax Revenue Agents and Tax Auditors for new businesses by obtaining and coordinating the delivery of legal documentation, accounting records, and business information.

Prepares tax returns and other legal tax documents.

Researches, analyzes, and prepares appropriate documents for real property deed process, orders title search reports, processes deeds according to legal guidelines and deed application fees, and records deed trust funds.

Works with and coordinates with payroll companies regarding occupational privilege tax (OPT), ensures that payroll companies understand OPT and the proper methods for withholding, calculating, tax return completion, and remittance; and follows up on any problem returns or discrepancies.

Assists with the overall administration of the biannual sales tax license renewal program.

Researches and resolves complicated exception payments by contacting the taxpayer and working through any misconceptions or misunderstandings.

Provides new business tax data to management.

Generates and sends specific billings and calculates specific assessments, taxes due, and/or additional interest and penalties due for certain taxes.

Provides primary assistance to the unit supervisor for the annual tax lien sale including making determinations regarding which properties will be included based on legal descriptions and other factors.

Identifies lockbox processing rule modifications required by the bank to resolve payment and compliance issues and reports them to the supervisor; reviews bank lockbox processing and transmission file elements for compliance with processing rules and agency requirements; reconciles reported lockbox activity to bank deposit activity; and takes necessary steps to ensure all correct and completed activities have occurred.

Develops or modifies work plans, methods, and procedures, determines work priorities, and develops work schedules to provide adequate staff coverage.

Provides work instruction and assists employees with difficult and/or unusual assignments.

Assigns and distributes work, reviews work for accuracy and completeness, and returns assignments with recommendations for proper completion.

Resolves problems encountered during daily operations and determines appropriate solutions.

Contributes to the development of the performance enhancement plan, documents performance, provides performance feedback, and furnishes information for the formal performance evaluation.

Responds orally to informal grievances and relays information to the supervisor.

Documents situations which may be cause for disciplinary action and provides this information to the supervisor.

Performs other related duties as assigned or requested.

Any one position may not include all of the duties listed. However, the allocation of positions will be determined by the amount of time spent in performing the essential duties listed above.

MINIMUM QUALIFICATIONS

Competencies, Knowledges & Skills:

Customer Service – Works and communicates with clients and customers to satisfy their expectations. Committed to quality services.

Integrity/Honesty – Contributes to maintaining the integrity of the organization, displays high standards of ethical conduct, understands the impact of violating these standards on an organization, self, and others, and is trustworthy.

Reading – Understands and interprets written material including technical material, rules, regulations, instructions, reports, charts, graphs, or tables and applies what is learned from written material to specific situations.

Writing – Uses correct English grammar, punctuation, and spelling, communicates information in a succinct and organized manner, and produces written information that is appropriate for the intended audience.

Interpersonal Skills – Shows understanding, courtesy, tact, cooperation, concern, and politeness to others and relates well to people from varied backgrounds and situations.

Listening – Receives, attends to, interprets, and responds to verbal messages and other cues such as body language in ways that are appropriate to listeners and situations.

Oral Communication – Expresses information effectively taking into account the audience and nature of the information, listens to others, attends to nonverbal cues, and responds appropriately.

Problem Solving – Identifies problems, determines accuracy and relevance information, and uses sound judgment to generate and evaluate alternatives and to make recommendations.

Decision Making – Specifies goals and obstacles to achieving those goals, generates alternatives, considers risks, evaluates and chooses the best alternative in order to make a determination, and draws conclusions or solves a problem.

Arithmetic/Mathematical Reasoning – Performs computations such as addition, subtraction, multiplication, and division correctly and solves practical problems by choosing appropriately from a variety of mathematical techniques such as formulas and percentages.

Manages and Organizes Information – Identifies a need, gathers, organizes, and maintains information, determines its importance and accuracy, and communicates it by a variety of methods.

Organizational Awareness – Knows how organizational and technological systems work and operates effectively within them. This includes policies, procedures, rules, and regulations of the work unit or organization.

Reasoning – Discovers or selects rules, principles, or relationships between facts and other information.

Teamwork – Encourages and facilitates cooperation, pride, trust, and group identity, fosters commitment and team spirit, and works with others to achieve goals.

Diversity – Is sensitive to cultural diversity, race, gender, and other individual differences in the workforce.

Technology Application – Uses machines, tools, instruments, and/or equipment effectively and uses computer applications to analyze and communicate information in the appropriate format.

Information Management – Identifies a need for and knows where or how to gather information and organizes and maintains information or information management systems.

Knowledge of the principles of confidentiality related to the work assignment.

Knowledge of supervisory theories and methods sufficient to be able to perform a variety of lead work functions.

Physical Demands:

Standing: remaining on one's feet in an upright position.

Walking: moving about on foot.

Sitting: remaining in the normal seated position.

Lifting: raising or lowering an object from one level to another.

Balancing: maintaining body equilibrium to prevent falling over.

Reaching: extending the hand(s) and arm(s) in any direction.

Handling: seizing, holding, grasping, or otherwise working with hand(s).

Fingering: picking, pinching, or otherwise working with fingers.

Talking: expressing or exchanging ideas by means of spoken words.

Hearing: perceiving the nature of sounds by the ear.

Repetitive motions: making frequent movements with a part of the body.

Eye/hand/foot coordination: performing work through using two or more.

Far Acuity: ability to see clearly at 20 feet or more.

Near Acuity: ability to see clearly at 20 inches or less.

Field of Vision: ability to see peripherally.

Accommodation: ability to adjust vision to bring objects into focus.

Working Environment:

Subject to many interruptions.

Education Requirement:

Graduation from high school or possession of a GED Certificate.

Experience Requirement:

Three years of clerical experience that must include one year of experience at the type and level of a Tax Technician I (provides assistance and information on taxation law, rules, regulations, and compliance payment procedures and performs tax lien, tax redemption, and tax lien sale functions).

Education/Experience Equivalency:

Appropriate education may be substituted for the minimum experience requirement except the one year of experience at the type and level of a Tax Technician I.

CLASS DETAIL

FLSA CODE: Non-Exempt

ESTABLISHED DATE: 01/18/2009

ESTABLISHED BY: Patricia Anderson

REVISED DATE:

REVISED BY:

CLASS HISTORY This is a new class.