



Career Service Authority

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Tax Technician I

GENERAL STATEMENT OF CLASS DUTIES

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.

DISTINGUISHING CHARACTERISTICS

This class performs full performance technical tax work. This class is distinguished from a Tax Technician II that 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. The Tax Technician I class is also distinguished from the Administrative Support Assistant IV class that performs specialized and/or technical office support work that requires detailed knowledge of the specialized/technical area.

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 with the public or employees where explanatory or interpretive information is exchanged, defended, and gathered and discretion and judgment are required within the parameters of the job function.

Level of Supervision Exercised:

No supervisory duties.

ESSENTIAL DUTIES

Provides information and assistance on taxation law, rules, regulations, and compliance procedures to a broad spectrum of stakeholders including businesses and their representatives, citizens, other governmental entities, and bank lockbox processing representatives.

Generates and sends a variety of tax bills including redemption, local improvement, service liens, and excise tax bills; files service liens with the Clerk and Recorder; calculates specific assessments and taxes due and/or additional interest and penalties due for special districts on property tax; and calculates certain assessments, additional interest, and penalties due for excise taxes.

Prepares specialized tax documents for businesses, attorneys, accountants, and citizens including a Certificate of Taxes Due for real property, local improvement, service liens, excise taxes, and business personal property tax.

Performs computer database tax account maintenance including updating mailing and location addresses, telephone numbers, ownership information, and reporting frequency requirements; reactivates dormant accounts; cancels accounts; sets up master tables for new and existing districts for local improvement and maintenance districts in the property tax system; performs research related to ownership, account status, and payment histories; verifies legal access to information; researches and resolves unidentified payments and tax documents; and researches returned mail.

Works in direct support of Tax Revenue Agents, Treasury Agents, and Tax Auditors by preparing tax work papers, tax assessment notices, delinquent tax notices, court and legal documents, and doing research and skip-tracing assistance.

Processes standard (excise, real, and personal property) and specialized tax payments (delinquent, redemption, local improvement, service liens, and real and personal property tax); prepares payment reports, spreadsheets, and bank reports; performs reconciliation duties for bank lockbox and redemption fund; prepares journal vouchers and CP's for entry into PeopleSoft; and assists with balancing unapportioned accounts and direct tax fund accounts.

Assists with the administration of the annual real property tax lien sale.

Verifies property tax, local improvement, maintenance district, service lien overpayments, and rejected payments and initiates taxpayer refunds for approval by lead or supervisory staff.

Reconciles individual sales, use, lodgers, and occupational privilege tax filings for taxpayers, data entry or bank processing errors that result in incorrect liabilities or suspended payments.

Researches, analyzes, and performs appropriate system transactions to correct tax payer return filings for sales, use, lodgers, and occupational privilege tax (OPT) based upon independent research, Treasury compliance staff recommendations, or taxpayer requests.

Generates and prepare taxpayers correspondence to communicate potential return errors and/or specific billings to collect underpayments.

Receipts all walk-in and internal payments for Treasury adhering to cash handling policies, procedures, technical industry security standards, and best practice standards; balances and records all Treasury revenue transactions in automated cashiering system; prepares worksheets and recording documentation for the Controller's Office; and prepares bank deposits adhering to bank and armored car contract assignment of unique CP number for entry into PeopleSoft.

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.

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 includes one year of experience with either tax related work, regulatory, policy-rules, research, bookkeeping, accounting, or cash handling and receipting type duties.

Education/Experience Equivalency:

Additional education may be substituted for the minimum experience requirement except for one year of experience performing tax related work, regulatory, policy-rules, research, bookkeeping, accounting, or cash handling and receipting type duties.

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.