



Office of Human Resources
Tax Technician II - CV2356
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General Statement of 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.

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 performance goals, documents performance, provides performance feedback, and provides information to inform 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.

Competencies

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

Oral Communication – Expresses information to individuals or groups effectively; taking into account the audience and nature of the information; makes clear and convincing oral presentations; listens to others, attends to nonverbal cues and responds appropriately.

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

Reasoning – Identifies rules, principles, or relationships that explain facts, data, or other information; analyzes information and makes correct inferences or draws accurate conclusions.

Working with People - Shows respect for the views and contributions of other team members. Shows empathy, listens, supports, and cares for others, and reconciles conflict

Writing – Writes in a clear, concise, organized, and convincing manner for the intended audience.

Knowledge & Skills

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

Education Requirement

Graduation from high school or the possession of a GED, HiSET or TASC Certificate.

Experience Requirement

Three (3) years of clerical experience that must include one (1) 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

Additional appropriate education may be substituted for the minimum experience requirements.

Licensure & Certification

None

Working Environment

Subject to many interruptions.

Level of Physical Demand

1-Sedentary (0-10 lbs.)

Physical Demands

(Physical Demands are a general guide and specific positions will vary based on working conditions, locations, and agency/department needs.):

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

Walking: moving about on foot.

Sitting: remaining in the normal seated position.

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.

Lifting: raising or lowering objects weighing no more than 10 pounds, from one level to another.

Background Check Requirement

Criminal Check

Employment Verification

Assessment Requirement

None

Probation Period

Six (6) months.

Class Detail

Pay Grade: V-616

FLSA Code: N

Established Date: 9/21/2018

Established By: LS

Revised Date:

Revised By:

Class History: