



Office of Human Resources
Tax Technician I - CV2355
THIS IS A PUBLIC DOCUMENT

General Statement of 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 posting, 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.

Level of Supervision Exercised

None

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.

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

Customer Service – Interacts with customers in a friendly and professional manner, works to resolve issues quickly and effectively, and is knowledgeable about products and services.

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

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.

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 includes one (1) 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 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

Numeric Data Entry

Probation Period

Six (6) months.

Class Detail

Pay Grade: V-614

FLSA Code: N

Established Date: 9/21/2018

Established By: LS

Revised Date:

Revised By:

Class History: