General Statement of Duties

Performs entry to intermediate level technical work assisting taxpayers with making tax payments, which includes processing payments, reconciling taxpayer accounts, preparing billing statements, and explaining tax ordinances and laws.

Distinguishing Characteristics

The following characteristics distinguishes the classifications within the Tax Technician Series:

The Tax Technician I is responsible for performing entry to intermediate level work processing tax payments, while gaining the experience to operate independently and at the full performance level.

The Tax Technician II is responsible for performing full performance, independent, and complex work processing tax payments.

The Tax Technician Specialist is responsible for coordinating tax petition hearings and processing specialized tax requests such as refund claims, researching bankruptcies, and processing property tax cases.

The Tax Technician Supervisor is responsible for overseeing the work of Tax Technicians and other administrative and support staff engaged in the processing of tax payments.

Guidelines, Difficulty and Decision-Making Level

Procedures, methods, and techniques to be used are well established with options to be considered well defined. Tools, work aids, and materials to be used are specified. Work steps are demonstrated or made clear by straightforward oral instructions.

Duties assigned are primarily routine, repetitive, and restricted in intricacy with little or no discretion in how they are carried out.

Level of Supervision Received & Quality Review

Under normal supervision, within a standardized work situation, the employee performs duties common to the line of work without close supervision or detailed instruction. Work product is subject to continual review.

Interpersonal Communication & Purpose

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

Level of Supervision Exercised

None
Essential Duties

Provides information and assists taxpayers with making tax payments, which includes processing payments, reconciling taxpayer accounts, preparing billing statements, and explaining tax ordinances and laws.

Provides customer service while answering high volumes of phones calls and emails, directing calls and sending emails to appropriate departments and personnel, which includes greeting walk-in customers and providing taxpayer services.

Performs general account maintenance, which includes processing tax payments, preparing refund claims, reconciling account discrepancies, researching and resolving payments issues, cross referencing accounts and balances, updating account contact information, and preparing tax billing statements and notices.

Prepares and sends a variety of tax billing statements, which includes calculating taxes due, special assessments, fees, interest, and penalties accrued for local improvements, assessments of business personal property, service liens, and excise taxes, and files forms and records with associated city departments.

Works with stakeholders both internal and external to the city regarding tax payments, providing historical information, and assisting customers with taxes, taxation laws, and compliance procedures, which includes working with vendors, contractors, banks, auditors, citizens, and other government organizations.

Manages cash handing, which includes balancing registers, reconciling discrepancies, preparing journal vouchers, preparing bank deposits, and maintaining records.

Maintains account records and legal documents, which includes maintaining payment receipts and statements, documenting liens, and ensuring business licenses are current and up-to-date.

Prepares payment reports, which includes creating spreadsheets and entering data into financial systems.

Performs other related duties as assigned or requested.

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

Competencies

Arithmetic and 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; considering 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

Two (2) years of clerical level experience performing accounting, bookkeeping, cash handling, or customer service involving the explanation of rules and regulations.

Education & Experience Equivalency

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

Licensure & Certification

By position, requires a driver’s license at the time of application.

Licenses and certifications must be kept current as a condition of employment.

Working Environment

Pressure due to multiple calls and inquiries.
Subject to many interruptions.
Subject to varying and unpredictable situations.

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 failing 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

| FLSA Code:   | N                                      |
| Management Level: | 10                                    |
| Established Date: | 01/18/2009                           |
| Revised Date:   | 12/31/2018                            |
| Revised By:     | John Hoffman                          |
| Class History:  | 12/31/2018: Classification completely revised as part of the Tax Technician Study 2019. |