



Office of Human Resources
Tax Technician Specialist - CV3160
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General Statement of Duties

Performs specialized technical level work coordinating tax petition hearings and processing specialized tax requests such as refund claims, researching bankruptcies, and processing property tax cases.

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.

Level of Supervision Exercised

By position, performs lead work.

Essential Duties

Performs specialized technical level work coordinating tax petition hearings and processing specialized tax requests such as refund claims, researching bankruptcies, and processing property tax cases.

Works with stakeholders both internal and external to the city to coordinate tax hearings and process complex tax requests, which includes working with citizens, businesses, the state, and city departments and agencies.

Coordinates tax petition hearings, which includes receiving and logging excise tax petitions, ensuring petition complies with statutes and guidelines, prepares case records and reports for litigation, maintains case files and tracks cases in system, sends notifications, and closes out completed cases.

Researches bankruptcies involving tax liabilities, verifies outstanding taxes owed, prepares and files petition and claim against bankruptcy, and prepares case documents and records for attorneys.

Processes and enters omitted personal property assets into tax system, compares previous records with new declaration to verify adjusted assets, works with the auditors to process omitted personal property tax cases for taxes owed, prepares tax notifications and billing statements, and prepares taxpayer appeals and files paperwork for appeal hearings.

Processes payments within tax system, calculates delinquent interest and fees, processes credits and refunds, adjusts tax billing statements for tax exemptions, calculates prorations, prepares journal vouchers, maintains records and files, and prepares taxpayer billing statements and notifications.

Processes refund claims, which includes, logging requests, ensuring refund is authorized, requesting documentation, auditing and reviewing account records and documents, preparing and filing claims, reconciling accounts and correcting journal records, and preparing refund notifications.

Prepares a variety of reports to include, monthly reports to track hearings officer invoices, petition activity, collection of debts, and uncollectible accounts.

By position, performs lead work over Tax Technicians and processes tax payments.

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

Decision Making - Specifies goals and obstacles to achieving those goals, generates alternatives, considers risks, and evaluates and chooses the best alternatives to make determinations, draw conclusions or solve problems.

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.

Negotiation - Works with others toward an agreement that may involve exchanging specific resources or resolving differences.

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 research techniques sufficient to be able to determine what information is needed, secure and analyze desired information, and integrate research into reports and/or databases.

Skill in reviewing information, drawing conclusions, and making recommendations.

Skill in utilizing the principles and practices of effective and persuasive communications to elicit and/or present explanatory or interpretive information.

Ability to work independently under general instructions and be able to apply good judgment.

Education Requirement

Associate's Degree in Business Administration, Accounting, or a related field of study.

Experience Requirement

Three (3) years of technical level tax account management experience, which includes processing payments, reconciling accounts, assisting taxpayers with questions, and enforcing tax ordinances and laws.

Education & Experience Equivalency

One (1) year of the appropriate type and level of experience may be substituted for each required year of post-high school education.

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

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.):

Sitting: Remaining in the normal seated position.

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

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

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

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

Background Check Requirement

Criminal Check

Education Verification

Employment Verification

Assessment Requirement

None

Probation Period

Six (6) months.

Class Detail

Pay Grade: V-618

FLSA Code: N

Established Date: 5/26/2019

Established By: JH

Revised Date:

Revised By:

Class History: