



## JOB DESCRIPTION

Position: Finance Technician - Full Time-Income Tax  
Department: Finance  
Date: September 16, 2020

Classification: Hourly  
Location: City Hall Annex

### **GENERAL PURPOSE**

The purpose of the Finance Technician – Income Tax is the performing of various tax office functions such as reviewing and entering income tax returns, estimated tax payments, delinquent payments, and employer withholding payments; along with assisting customers at the counter and on the telephone.

### **SUPERVISION RECEIVED**

The Tax Commissioner and the Finance Director.

### **SUPERVISION EXERCISED**

None.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

Performing routine duties of tax preparation, computer data entry, reconciliation of accounts, and review of tax returns for accuracy.

Assisting customers at counter by taking payments and processing tax returns; sorting and posting daily mail which includes tax returns, taxpayer estimated payments and employer withholding payments; balancing the day's work and making bank deposits.

Assisting with the billing and collections process including but not limited to setting up and monitoring payment plans, processing small claims court filings and following up court judgments with the collections process.

Communicating with taxpayers and accountants in a courteous and confidential manner through written correspondence and by phone to obtain information necessary to ensure correctly filed returns

Other duties and projects as assigned by supervisor.

### **PERIPHERAL DUTIES**

None.

## **DESIRED MINIMUM QUALIFICATIONS**

Education and Experience:

(A) Graduation from high school or GED equivalent with some college preferred; or experience working in the field of accounting, tax preparation and/or auditing; or any equivalent combination of education and experience that provides the required knowledge, skills and abilities.

Necessary Knowledge, Skills and Abilities:

- (A) Computer skills necessary including but not limited to data entry, word processing (Word), spreadsheets (Excel), email and accounting and/or tax software.
- (B) Customer service skills with high importance in the ability to be discreet and follow rules of confidentiality
- (C) Problem solving and research skills, accuracy and attention to detail essential.
- (D) Ability to communicate effectively with a variety of work related contacts; ability to answer inquiries from the public in a respectful, tactful, and professional manner.

## **TOOLS AND EQUIPMENT USED**

Requires frequent use of standard office equipment; including computer and related software, telephone, copier, scanner, fax machine, calculator and postage machine.

## **PHYSICAL DEMANDS**

Frequently required to sit for long periods of time, stand, talk, hear, walk, use of hands and arms to reach and operate equipment. Extensive use of computer requiring close vision and the ability to adjust focus. Ability to lift and/or move up to 25 pounds on occasion as part of the retention and organization of records.

## **WORK ENVIRONMENT**

There is an open office atmosphere which allows for frequent interaction with co-workers; it also requires the ability to concentrate with some distractions and interruptions. The noise level in the work environment is usually at a moderate level.

## **SELECTION GUIDELINES**

Formal application, rating of education and experience; oral interview and reference check; job related tests may be required.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Signature: \_\_\_\_\_  
Supervisor/Dept. Head

Signature: \_\_\_\_\_  
Employee:

Effective Date: \_\_\_\_\_

Revision History: \_\_\_\_\_