

# CITY OF SOUTH LEBANON

An Equal Opportunity Employer

## POSITION DESCRIPTION

<b>Position Title:</b>	<b>Tax Clerk</b>		
<b>Employment Status:</b>	Full-time	<b>Dept./Division:</b>	Finance / Tax
<b>FSLA Status:</b>	Non-Exempt	<b>Reports To:</b>	Tax Administrator
<b>Pay Grade:</b>	Level 3	<b>Classification:</b>	Classified

### GENERAL DESCRIPTION:

Under the administrative direction of the Tax Administrator, the Tax Clerk position exercises initiative, independence, and mature judgement in performing assigned activities associated with collecting the City's local earnings tax including reviewing income tax returns for accuracy and compliance with the City's tax ordinance, preparing correspondence to taxpayers, and reviewing delinquent accounts for collections. This position requires a high level of detail and accuracy and the ability to maintain the integrity of highly confidential information. The position offers cross-functional support within the Department of Finance.

### MINIMUM QUALIFICATIONS FOR EMPLOYMENT:

 An example of acceptable qualifications:

Completion of secondary education or equivalent (high school diploma or GED) and one (1) year recent documented work experience and/or training in accounting, bookkeeping, finance, income tax, or related activities; or any combination of education, training, and/or experience which provides the desired knowledge, skills, and abilities to perform the essential functions of this position. Must demonstrate excellent interpersonal skills.

### LICENSURE OR CERTIFICATION REQUIREMENTS:

Must possess and maintain a valid State of Ohio driver's license; remain insurable under the City's vehicle insurance plan.

### EQUIPMENT OPERATED:

 The following are examples only and are not intended to be all inclusive:

Personal computer, computer software (MITS - Municipal Income Tax Software, Microsoft Office, and other applicable computer software), printer, copier, fax machine, postage machine, calculator, scanner, shredder, telephone, mobile phone, and other commonly used standard modern business office equipment.

### INHERENTLY HAZARDOUS OR PHYSICALLY DEMANDING WORKING CONDITIONS:

Employee has exposure to chemical compounds found in an office environment (e.g., toner, correction fluid, etc.); may be required to lift, carry, push, or pull heavy objects; may be exposed to hostile or upset members of the general public; this is considered sedentary work and the employee must demonstrate the ability to perform the physical demands required of the position in accordance with the U.S. Department of Labor's physical demands strength ratings.

In cases of emergency, unpredictable situations, and/or department needs, may be required to lift, push, pull, and/or carry objects heavier than D.O.L. strength ratings recommend.

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### **JOB DESCRIPTION AND WORKER CHARACTERISTICS:**

JOB DUTIES in order of importance

### **ESSENTIAL FUNCTIONS OF THE POSITION:** For purposes of 42 USC 12101:

- (1) Responds to the needs of resident and business taxpayers via phone, letter, and personal interview. Answers routine inquiries concerning the City's tax ordinance and prepares local tax returns for residents. Fosters positive community relations by providing exceptional customer service.
- (2) Audits and maintains files for resident and business taxpayers; reviews tax returns for accuracy and compliance with the City's tax ordinance; calculates penalties and interest when appropriate; prepares and issues taxpayer correspondence; posts final returns to resident and business taxpayer accounts; responds to incoming correspondence; attempts collection of delinquent accounts; and prepares resident and business account refund requests.
- (3) Receives payments and prepares receipts; posts tax transactions including payments to proper accounts; balances cash drawer; prepares bank deposits; prepares and maintains records according to established procedures; retrieves information from files.
- (4) Greets and assists visitors, guests, residents, or other persons entering department or the municipal building; answers telephone; responds to routine inquiries and complaints; provides general information to public or refers to appropriate City staff; assists public with completion of routine forms; opens, sorts, and distributes incoming mail and processing outgoing mail.
- (5) Gathers data from various sources in search of new accounts, delinquent accounts, and discontinued accounts.
- (6) Makes bank deposits; delivers outgoing mail to post office.
- (7) May assist the Director of Finance and/or Asst. Fiscal Officer with routine general finance office duties (e.g., mail, receipts, daily deposits, etc.).
- (8) Attends various meetings, trainings, and seminars, as directed.

### **OTHER DUTIES AND RESPONSIBILITIES:**

- Maintains required licenses and/or certificates.
- Demonstrates regular and predictable attendance.

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- Meets all job safety requirements and all OSHA safety standards that pertain to essential functions.
- Performs other related duties as assigned.

### MINIMUM ACCEPTABLE CHARACTERISTICS: (\*indicates developed after employment)

**Knowledge of:** \*City and department goals and objectives; \*City and department policies and procedures; \*City tax ordinance and tax software (MITS – Municipal Income Tax Solutions); modern office practices and procedures; computer-related software (e.g., Microsoft Word, Excel and Outlook); general business practices, basic accounting; bookkeeping; tax payments or collections; general finance; workplace safety practices and procedures; records management; English grammar and spelling.

**Skill in:** Computer operation; adding machine or calculator operation; use of modern office equipment; motor vehicle operation.

**Ability to:** Interpret a variety of instructions in written, oral, picture, or schedule form; understand, interpret, and apply laws, rules, or regulations to specific situations; read, copy, and records figures accurately; add, subtract, multiply, and divide whole numbers; calculate fractions, decimals, and percentages; copy records precisely without error; complete routine forms; prepare routine correspondence; compile and prepare reports; respond to routine inquiries from public and/or officials; communicate effectively; maintain records according to established procedures; handle sensitive inquiries from and contacts with officials and general public; develop and maintain effective working relationships; resolve complaints; travel to and gain access to work site.

### POSITIONS DIRECTLY SUPERVISED:

None.

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This position description in no manner states or implies that these are the only duties and responsibilities to be performed by the position incumbent. My (employee) signature below signifies that I have reviewed my position description, and that I understand the contents of the position description. I agree to abide by the requirements set forth. I understand that it is my responsibility to inform my supervisor at any time that I am unable to perform these activities.

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(Approval of Appointing Authority or Designee)

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(Date)

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(Employee Signature)

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(Date)

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Date Adopted: 8/19/2021

Developed by:

Date Revised: 7/9/2024

Clemans, Nelson & Associates, Inc