

CITY of MONROE
An Equal Opportunity Employer
POSITION DESCRIPTION

Employee Name:		Position Title:	Income Tax Administrator
Shift:	Mon.-Fri. 8:00am-5:00pm	FLSA Status:	Exempt
Employment:	Full-time	Civil Service Status:	Unclassified
Department:	Finance	Reports To:	Director of Finance

GENERAL DESCRIPTION:

Under general direction, Income Tax Administrator manages, plans, organizes, coordinates and directs the City's income tax collections and compliance work ensuring competence and compliance with the ORC and City of Monroe's applicable laws.

QUALIFICATIONS: An example of acceptable qualifications:

Bachelor's Degree from an accredited college or university with major course work in Finance, Public Administration, Accounting, Business or related field; five (5) years work experience in accounting, auditing, or tax preparation with at least two (2) years in a supervisory capacity; or any equivalent combination of education, experience, and training which provides the required knowledge, skills, and abilities.

LICENSURE OR CERTIFICATION REQUIREMENTS:

Must be bondable.

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

Computers, telephone, fax machines, copiers, scanners, and other standard office equipment; motor vehicle.

INHERENTLY HAZARDOUS OR PHYSICALLY DEMANDING WORKING CONDITIONS:

Employee ascends and/or descends ladders, stairs, or scaffolds; has exposure to chemical compounds found in an office environment (e.g., toner, correction fluid, etc.); works on and around powered platforms and/or vehicle mounted platforms (e.g., manlifts, fire trucks); is exposed to environmental conditions which may result in injury from fumes, odors, dusts, mists, gases, and/or poorly ventilated work areas; is exposed to possible injury from extremely noisy conditions above 85db (e.g., loud sirens, screaming people, building alarms, etc.); is exposed to possible injury from hazardous gases, chemicals, flammables, air contaminants, hazardous waste, unclean or unsanitary conditions, electrical shock; exposed to possible injury from radiation; exposed to possible injury from explosions; is exposed to possible injury as a result of falling from high places; works in or around crowds; has contact with potentially violent or emotionally distraught persons or vicious animals or life threatening situations; has exposure to fire, hot, cold, wet, humid, or windy weather conditions; exposure to extreme non-weather related heat or cold; exposure to shaking objects or surfaces; exposure to second-hand smoke; exposure to hazardous driving conditions; works, first, second or third shift; is periodically exposed to blood and other bodily fluids, as well as other potentially infectious materials; uses eye and face protection for potential exposure to flying objects, respiratory protection for potential exposure to airborne contaminants, head protection for potential impacts of objects to the head, and occupational foot protection for potential impacts of objects to the feet; participants in medical and first aid activities; exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly (Constantly: activity or condition exists 2/3 or more of the time) to move objects. Physical demand requirements are in excess of those for Sedentary Work. Even though the weight lifted may be only a negligible amount, a job should be rated Light Work: (1) when it requires walking or standing to a significant degree; or (2) when it requires sitting most of the time but entails pushing and/or pulling of arm or leg controls; and/or (3) when the job requires working at a production rate pace entailing the constant pushing and/or pulling of materials even though the weight of those materials is negligible. NOTE: The constant stress and strain of maintaining a production rate pace, especially

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in an industrial setting, can be and is physically demanding of a worker even though the amount of force exerted is negligible.

Note: In accordance with the U.S. Department of Labor physical demands strength ratings, this is considered light work.

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.

JOB DESCRIPTION AND WORKER CHARACTERISTICS:
JOB DUTIES in order of importance

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

- 20% 1. Plans, assigns, directs and oversees the work activities of Income Tax Auditors; interviews and recommends hiring, terminating, promoting and other changes in employee statuses; trains employees; performs employee evaluations and recommends disciplinary action accordance with City policy.

- 25% 2. Administers and enforces the City income tax ordinances, rules, and regulations; reviews, examines, audits, and evaluates City tax returns of residents and businesses for accuracy and compliance with the tax ordinance; prepares detailed reports on audit findings; notifies taxpayers of any overpayment or underpayment, and either issues a refund or requests further payment.

- 20% 3. Administers city-wide collection of municipal income tax revenue, subject to the provisions of State statutes and City ordinances; oversees the receipt and processing of electronic filing and payments; receives and deposits moneys; ensures all collections are properly recorded and balanced; contacts taxpayers by mail or telephone to address discrepancies, requests supporting documentation, and maintains records for each case; sends notices to taxpayers when accounts are delinquent; imposes payment deadlines on delinquent taxpayers and monitor payments to ensure that deadlines are met; oversees collection of delinquent accounts and deferred payment accounts; provides the timely and accurate periodic reporting requirements..

- 10% 4. Investigates claims of inability to pay taxes by researching court information for the status of liens, mortgages, or financial statements, or by locating assets through third parties; recommends criminal prosecutions or civil penalties to City Law Director; directs service of legal documents, such as subpoenas, warrants, notices of assessment, and garnishments; determines appropriate methods of debt settlement, such as offers of compromise, wage garnishment, or seizure and sale of property; appears in court as the City's representative..

- 10% 5. Handles City's income tax ordinances inquiries and complaints from taxpayers; answers questions from taxpayers and assists them in completing tax forms; confers with taxpayers or

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their representatives to discuss the issues, laws, and regulations involved in returns, and to resolve problems with returns.

- 10% 6. Maintains knowledge of tax code changes, and of accounting procedures and theory to properly evaluate financial information; implements changes in procedure to streamline the tax collection process; administers income tax software; responsible for proper records retention following guidelines set in the ORC.
- 7. Attends meetings and serves on committees, as required; attends various meetings, seminars, and workshops.
- 8. Meets all job safety requirements and all applicable OSHA safety standards that pertain to essential functions.
- 9. Demonstrates regular and predictable attendance; due to the nature of the job, the Income Tax Administrator may be required to return to work after normal work hours or on weekends when assigned or when requested to do so.

OTHER DUTIES AND RESPONSIBILITIES:

- 5% 1. Performs other duties as assigned.

MINIMUM ACCEPTABLE CHARACTERISTICS: (*indicates developed after employment)

Knowledge of: *City and Department goals and objectives; *City and Department policies and procedures; basic accounting; auditing, finance; City tax code; tax settlement and distribution; public relations; personnel administration; employee training and development; supervisory principles and practices; general office practices and procedures; English spelling, grammar, and punctuation.

Skill in: Use of modern office equipment; data entry; adding machine or calculator operation; computer operation; Microsoft Office applications.

Ability to: Interpret extensive variety of technical material in books, journals, and manuals; deal with many variables and determine specific action; apply management principles to solve agency problems; understand, interpret, and apply laws, rules, or regulations to specific situations; exercise independent judgment and discretion; complete routine forms; prepare accurate documentation; compile reports; gather, collect, and classify information; add, subtract, multiply, and divide whole numbers; calculate fractions, decimals, and percentages; communicate effectively; respond to inquires from public and/or officials; compile and prepare reports; understand technical manuals and/or verbal instructions; develop and maintain effective working relationships; resolve complaints; travel to and gain access to worksite.

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POSITIONS DIRECTLY SUPERVISED:

Income Tax Auditor.

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 and understand and agree with the contents of this position description.

(Signature of Appointing Authority/Designee)

(Date)

(Signature of Employee)

(Date)