

## **TAX ANALYST**

### **DEFINITION OF WORK**

Employees in this class perform a variety of technical, administrative, clerical, research, processing, and public contact work in the County Tax Department, with responsibility for complex and specialized collections or listing processes. Employees have responsibility for processing complex transactions and providing others with advice and counsel in the Tax Departments' billing, listing, or delinquent collection processes, while assisting in the work of other divisions when needed. Work is characterized by the variety and complexity of duties performed. Employees are expected to perform at the journey level requiring knowledge of most programmatic areas, and to have considerable knowledge of the full tax process. Work is performed using specialized accounting, word processing, and data base software. Independent judgment must be exercised in applying laws, policies, and procedures to specific situations such as specialized billing, collections, and listing processes. Considerable tact and courtesy must be exercised in dealing with the public on tax questions. Work is differentiated from the Tax Assistant class by the complexity and accountability of work which requires more technical knowledge and responsibility. Accuracy is required in making calculations, in handling money, and in entering data into the computer. Work is performed under general and direct supervision; however, the employee is often assigned to work independently on a specific tax function under limited supervision. Work is supervised by a Tax Program Supervisor or Manager and is evaluated through conferences and overall effectiveness of work performed.

### **EXAMPLES OF WORK**

Employees assist taxpayers by researching delinquent accounts including deeds, birth, and death records; gathering information and preparing documentation for legal to proceed with foreclosures; maintaining records and information concerning County owned properties; preparing and processing necessary paperwork associated with garnishments, attachment of bank accounts and rents, and foreclosure of real estate; reviewing, verifying, and recording all bankruptcies on real and personal property and/or business personal property and maintaining files; mailing foreclosure and delinquent tax notices to delinquent taxpayers and preparing delinquent lists; arranging payment schedules for delinquent taxpayers. Work may include advising delinquent taxpayers as to the options they have in paying delinquent taxes such as payment in full, garnishments of wages, levy on bank accounts, or seizing and auctioning off any item of value for payment; calculating penalties and interest charges due on delinquent and special assessment accounts; preparing edits, analyzing and verifying information on property appraisals, business and non-business listings, real estate, DMV files, tax billing, adjustments, refunds, collection of revenues and other tax program documents; providing technical assistance to the general public, legal, and Departmental staff regarding assigned program policies, procedures, researching and analyzing information such as property identification, tax assessments, schedules, tax adjustments, payoffs and assisting with deed references, special assessments, tax statements and tax billing and system records discrepancies; and preparing reports for management and notifying management when problems arise. Work in this class also includes consolidating daily, monthly, and yearly levy totals on all revenues; compiling statistical financial reports and ensuring correct distribution of revenues; monitoring, analyzing and preparing reconciliations; preparing refund reports to management; preparing, editing, analyzing and verifying information for accounts payable and receivables; designing and implementing financial programs for analytical reporting and report preparation; providing information and assistance in interpreting financial results; identifying internal control processes and procedures; identifying discrepancies within the revenue totals; reviewing records to insure correct listings, preparing abstract books, correcting errors and updates information; performing related work as required.

## **EMPLOYMENT STANDARDS**

### **Education and Experience:**

Graduation from a two-year community college with a degree in business, finance, or accounting supplemented by course work in tax listing, assessment, and collections and three years of experience in a tax department; or an equivalent combination of education and experience.

### **Knowledge, Skills, and Abilities:**

Considerable knowledge of the North Carolina Machinery Act and County tax policies concerning the area to which assigned; considerable knowledge of the procedures, laws, forms and records used in the listing, assessment, billing or collections functions; considerable knowledge of modern office practices and procedures and of forms and computers used in the preparation of records and conducting research; general knowledge of the full tax process affecting the public; skill and knowledge in automated systems and their applications in the tax office, and accuracy in preparation of reports and legal instruments; skill in data entry and retrieval; ability to communicate effectively in oral and written form; ability to make arithmetical calculations; ability to deal courteously and tactfully with the co-workers and the general public in explaining tax laws and policies; ability to establish and maintain effective working relationships as necessitated by work assignments; ability to maintain accurately records and reports and compute figures rapidly and accurately.

## **SPECIAL REQUIREMENTS**

Completion of the North Carolina Fundamentals of Property Tax Listing and Assessing course within 18 months of hiring date is required. Background check with local law enforcement agency required. Some positions within classification may require a valid North Carolina driver's license. Condition of Employment: Each applicant who is tendered an offer for employment for any position with Cumberland County shall be tested for the use of drugs specified in the County policy. Refusal to submit to testing or a confirmed positive test shall be basis for withdrawal of the conditional employment offer.

## **ADA REQUIREMENTS**

Employees are subject to hazards associated with an office environment to include working in cramped conditions, retrieving heavy books and associated ergonomic and visual acuity issues.

## **PHYSICAL REQUIREMENTS**

Must be able to physically perform the life support functions of talking, reaching, stooping, kneeling, lifting, fingering, hearing, talking, and repetitive motions; must be able to perform light work 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 to move objects; must possess the visual acuity to prepare and analyze data and figures, fill out forms, and operate a computer and other office machinery.