

UTAH COUNTY JOB DESCRIPTION

CLASS TITLE: TAX ADMINISTRATION CLERK I/II/III
CLASS CODE: I – 6247 II – 6246 III – 6245
FLSA STATUS: NON-EXEMPT
SUPERVISORY STATUS: I – NONE II – NONE III – LEAD
EFFECTIVE DATE: 07/13/2016 (REVISED 06/14/2008 VERSION)
DEPARTMENT: CLERK/AUDITOR

JOB SUMMARY

Performs a variety of clerical duties and answers public inquiries related to tax administration; processes tax abatement applications and completes abatement reports; assists in coordinating annual Board of Equalization hearings and May Tax Sale.

CLASS CHARACTERISTICS

Tax Administration Clerk I: Works under close to general supervision from the Tax Supervisor in performing duties at a training level or in performing routine tasks that are less complex or detailed than those performed at the full performance level.

Tax Administration Clerk II: This full performance level works under general supervision from the Tax Supervisor in performing duties of considerable difficulty that involve some independent judgement.

Tax Administration Clerk III: Works under general supervision from the Tax Supervisor in performing the most complex duties within the assigned function. This advanced level requires considerable knowledge of the policies, procedures, and laws affecting the work. Incumbents at this level are capable of training and leading others.

ESSENTIAL FUNCTIONS

Abatements

Analyzes tax returns and extracts information needed to make recommendations on tax abatement applications based on criteria including income, age, disability, and veteran status. Probes applicant for necessary information in order to arrive at a valid gross income; reviews financial documents, including bank statements, pension statements, income statements and related documents to determine gross household income, taking into consideration depreciation, no claimed residence, unemployment disbursements, worker's compensation, capital gains/loss carry forwards, government assistance, annuities, Social Security, Railroad Retirement (taxable/untaxable), total interest and dividends (taxable/untaxable), alimony, and any other income.

Answers questions from prospective applicants; assists applicants in completing paperwork; works with outreach workers from Community Action in providing assistance to home bound applicants. Prints and mails abatement application forms annually to individuals who qualified the previous year for tax abatements; follows up on incomplete applications; ascertains the portion of property used for business/rental purposes; delves into ownership issues surrounding recorded documents.

Completes abatement reports, including reports for the State of Utah. Adheres to Standards of Practices from the State Tax Commission, Utah State Code and Utah County Code related to tax relief, tax abatements, and equalization.

Equalization

Assists in preparing and organizing yearly Board of Equalization (BOE) hearings; assists supervisor in scheduling independent hearing officers ensuring that they sign contracts, non-disclosure agreements; and that

contracts are ratified by the Commission; collects W-9's; prepares and mails decision letters to applicants; assists petitioners with initial county appeal applications and appeals to the State Tax Commission; updates information as needed.

Acts as secretary for monthly BOE meetings; prepares and distributes agendas; prepares minutes for approval at meetings; schedules individuals and organizations to appear at the BOE Meeting; ensures the BOE Meetings are properly noticed; notifies the public of final decisions; generates follow-up correspondence regarding actions taken at BOE Meetings; scans and archives appeal applications for review of valuation, Greenbelt, and tax exemption status. Answers public inquiries.

Tax Exemption

(This work is performed mainly from January 1 – March 1)

Verifies tax exempt status of non-profit organizations; reviews Articles of Incorporation and other pertinent documents; advises the applicant on what documentation is required to complete application process; verifies both personal and real property; handles correspondence before and after meetings; tracks and monitors exemption application to ensure adherence to statutory deadlines; places exemption applications before the Board of Equalization for acceptance or denial at the monthly BOE Meeting.

Tax Sale

Assists in preparing and organizing the annual May Tax Sale; Duties as assigned by Supervisor.

ADDITIONAL RESPONSIBILITIES MAY INCLUDE

Other clerical functions within the department as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

Tax Administration Clerk I:

Basic Knowledge of:

Processes related to the statutory obligations of the County Clerk/Auditor's Office.

Skill in:

Reading, writing, and basic math.

Operating standard office equipment.

Word processing, data entry, basic spreadsheets.

Ability to:

Learn software programs unique to Utah County and/or the Clerk/Auditor's Office.

Maintain cooperative working relationships with those contacted during the course of work activities.

Communicate effectively verbally and in writing.

Understand and follow clear work instructions.

Distill relevant and useful elements from vast amounts of information.

Tax Administration Clerk II (In addition to the knowledge, skills, and abilities listed above):

Working knowledge of:

Processes related to the statutory obligations of the County Clerk/Auditor's Office.

Skill in:

Using various software programs unique to Utah County and/or the Clerk/Auditor's Office.

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Ability to:

Understand broad objectives and follow general instructions.
Work with confidential matters.
Know what to ask customers and balance directness with tact and patience.
Accept/reject tax abatement applications according to policy guidelines.

Tax Administration Clerk III: (In addition to the knowledge, skills, and abilities listed above):

General Knowledge of:

Property Tax statutes and Standard of Practice.

Considerable Knowledge of:

Clerk/Auditor Office Policies and Procedures and laws, codes, or regulations relevant to work performed.

Advanced Skill in:

Analysis of public policy relating to property valuation, certified tax rates, and tax sales

Ability to:

Train and lead others.

PHYSICAL DEMANDS

Regularly:

Sits at a desk.
Walks, stands, or stoops.
Works for sustained periods of time maintaining concentrated attention to detail.

Occasionally:

Lifts and moves objects weighing up to 25 pounds.
Drives a motor vehicle.

Accommodation may be made for some of these physical demands for otherwise qualified individuals who require and request such accommodation.

WORKING CONDITIONS

Work is performed in an office or other environmentally controlled room. Work requires frequent contact with the public which exposes incumbents to others' illnesses and to individuals that may be angry, agitated, or otherwise upset. Work occasionally requires incumbent to work outside of normal working hours.

EDUCATION AND EXPERIENCE

Selected applicants may be subject to a background check.

Tax Administration Clerk I: High school diploma or equivalent and three (3) years of general clerical support work experience. Equivalent combinations of education and experience may also be considered. Selected applicants must pass a typing test at or above the rate of 40 WPM net.

Tax Administration Clerk II: High school diploma or equivalent and five (5) years of clerical support work experience of which a minimum of two (2) years are directly related to property tax administration. Equivalent

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combinations of education and experience may also be considered. Selected applicants must pass a typing test at or above the rate of 40 WPM net.

Tax Administration Clerk III: High school diploma or equivalent and five (5) years of clerical support work experience of which a minimum of four (4) years are directly related to property tax administration. Equivalent combinations of education and experience may also be considered. Selected applicants must pass a typing test at or above the rate of 40 WPM net.

LICENSING, CERTIFICATION, AND OTHER REQUIREMENTS

Tax Administration Clerk I: Applicant must possess a current driver license and obtain a valid State of Utah driver's license within 60 days of employment. Incumbent may be required to obtain State of Utah Certificate of Authority of Notary Public.

Tax Administration Clerk II (In addition to above): Incumbent may be required to attend and successfully complete the Utah State Property Tax Administration course.

Tax Administration Clerk III (In addition to above): Applicant has successfully completed all training modules in Utah State Property Tax Administration course.

CAREER LADDER ADVANCEMENT

For a promotion through career ladder advancement from a lower classification level of this series to a higher one, there must be funding in the budget and the employee must: 1) possess the required licensure and certifications of the higher classification level, 2) meet the education, experience, requirements and class characteristics of the higher classification level, 3) have written recommendation from the department head and, 4) receive approval from the Director – Office of Personnel Management.

This description lists the major duties and requirements of the job and is not all-inclusive. Incumbent(s) may be expected to perform job-related duties other than those contained in this document and may be required to have specific job-related knowledge and skills.