

CITY OF OAKWOOD
An Equal Opportunity Employer
POSITION DESCRIPTION

Class Title: Account Clerk II – Income Tax

Department/Division:	Income Tax	Reports To:	Income Tax Director
Employment Status:	Full-time	Supervises:	
FLSA Status:	Non-Exempt		

QUALIFICATIONS:

Graduation from an accredited two-year community college or four-year college or university with major course work in business administration, accounting or related field; or, four (4) years experience in accounting, taxation, or related field; or, any equivalent combination of education, training and experience which provides the required knowledge, skills and abilities.

LICENSURE OR CERTIFICATION REQUIREMENTS: NONE

KNOWLEDGE, SKILLS AND ABILITIES:

- Thorough knowledge of Oakwood Income Tax ordinance.
- Knowledge of federal and Ohio tax laws, regulations and schedules, as they directly apply to the examination and preparation of municipal tax returns.
- Ability to prepare municipal returns from information on varied tax documents, including but not limited to federal schedules, generic or other municipal tax returns.
- Ability to make necessary computations with accuracy and reasonable speed and with a thorough understanding.
- Reasonable speed and accuracy on computer key board.
- Ability to interpret and apply reasonable judgment based on comprehensive knowledge of office regulations and procedures.
- Ability to effectively communicate with taxpayers and tax preparers, both orally and in writing, information relative to tax returns and explain return adjustments in a manner which is easily understood.
- Complete knowledge of federal and state laws as they apply to the confidentiality of income tax information.
- Proficient in operating Microsoft Office applications (Word, Excel, Office Outlook) and municipal income tax software.
- Ability to handle stressful situations and deal with the public courteously and tactfully.
- Ability to follow both oral and written instructions.

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

- 45% 1) Responds to taxpayer and tax preparer inquiries, by telephone and by written correspondence to explain and achieve compliance with municipal tax requirements; assists taxpayers with preparation of municipal income tax returns; greets visitors.
- 25% 2) Performs data entry for all daily batch receipts; keeps track of return mail, updates database and resends mail accordingly.
- 5% 3) Audits all W-3 reconciliations.
- 15% 4) Performs typing and word processing of a variety of reports, correspondence, balance due notices and other administrative materials; maintains spreadsheet for daily tax receipts and prepares bank deposit slip; performs a variety of word processing and/or spreadsheet functions; maintains tax database (setting up new accounts, changing taxpayer profile information, inactivating accounts, etc.); researches and sets up accounts from water and contractor listings, real estate transactions and landlord/tenant listings.
- 5% 5) Assists other staff with the preparation and entering of daily cash receipts as needed.
- 5% 6) Prepares bulk mailings and the issuance of withholding and estimated tax vouchers
- 7) Meets all job safety requirements and all applicable OSHA safety standards that pertain to essential functions.
- 8) Demonstrates regular and predictable attendance.

OTHER DUTIES AND RESPONSIBILITIES:

- 9) Performs other related duties as required and assigned.

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

Modern office equipment, calculator, computer, telephone, postage meter, copier, fax machine.

INHERENTLY HAZARDOUS OR PHYSICALLY DEMANDING WORKING CONDITIONS:

- 1. Works in an area in which the means of egress is or can be obstructed.
- 2. Has contact with emotionally distraught persons.
- 3. Ascends/descends stairs.

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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 and understand the contents of my position description.

(Approval of Appointing Authority)

(Date)

(Employee Signature)

(Date)