

City of Shelby, Ohio  
JOB DESCRIPTION

**Position Title:** Income Tax Clerk II  
**Reports To:** Finance Director  
**FLSA Status:** Non-Exempt  
**Employment Status:** Full - Time  
**Normal Hours:** 8:00 a.m. – 4:00 p.m. (Monday – Friday)  
**Prepared Date:** 05/18/2023

**Department:** Income Tax

**Qualifications:**

Preferred Associate's degree in finance/accounting. Required to have experience with Microsoft Office programs (particularly Word and Excel), tax software, Internet navigation, and general office equipment such as copiers, fax machines, adding machine, and printers. Required to have experience in municipal tax.

**Essential Functions**

1. **40% Daily Functions** – Count and balance cash drawer, open incoming mail, reviewing it for accuracy and recording any payments to the proper accounts. Assist individuals and businesses in preparing and calculating their annual income tax returns, monthly and quarterly estimate payments, and monthly and quarterly withholding payments. Review all individual tax returns that contain business, rental, or “other income” line items.
2. **20%** Prepare daily deposits accurately and timely, calculating portioned amounts per fund and filing them with the finance office. Prepare daily, monthly, and annual statements showing year to date collections.
3. **20%** Take the lead in all aspects of the delinquent collection process. Responsibilities include typing letters on delinquent filers, verifying addresses, sending delinquents to the City Law Director for prosecution, communicating with Shelby Municipal Court on delinquent statuses, assessing interest and penalties correctly, and accurately reconciling withholding accounts.
4. **20%** Other general responsibilities include setting up new accounts, clearing “uncollectable” accounts, answering the telephone, waiting on taxpayers at counter, ordering of office supplies, printing and mailing forms.

**Supervisory Responsibilities:** None

**Non-essential Functions**

Must be able to prepare purchase requisitions, and work independently, or as a group in helping other employees with the daily functions of an office setting.

**Knowledge, Skills, and Abilities** (\*Indicates developed after employment)

**Knowledge**

Must have knowledge of generally accepted accounting. \*Must be able to understand and interpret basic tax rules and regulations.

**Skills**

Must be able to use office equipment such as copier, fax, printer, adding machine, and computers. Needs to be proficient with Microsoft Word, and \*MITS "Municipal Income Tax Solutions" software. Also needs to be self-motivated and be accurate when dealing with figures, and collection of money. Also needs strong written and oral communication skills, handle sensitive and confidential matters in a professional manner, establish facts & draw conclusions, and concentrate with attention to detail. Must have ability to speak effectively before tax payers or employees.

**Abilities**

Needs to be able to work independently. Must have ability to calculate figures and amounts such as penalties, interest, commissions, proportions, and percentages. Must have ability to read and interpret documents. Also, the ability to apply common sense reasoning to multiple problem types.

**Certificates, Licenses, Registrations**

Must be bondable with an insurance company. Must have a valid driver's license.

**Physical Demands**

In accordance with the US department of Labor physical demands strength rating, this is considered sedentary work.

**Work Environment**

Controlled climate professional office setting primarily, however, will need to run errands such as to the post office a few times a week in which time will be subject to current weather conditions.

**Approved:**

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Steven Schag  
Mayor

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Brian A Crum, CPA  
Director of Finance

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Name  
Income Tax Clerk II