



LEGISLATIVE COVER MEMO

Introduction: March 4, 2024

Agenda Item: **Resolution 2024-15**

AMENDING THE POSITION DESCRIPTION FOR THE FULL-TIME
INCOME TAX CLERK

Submitted by: Cindi Chibis, Human Resource

Scope/Description: As we prepare to hire a new full-time Income Tax Clerk, we've updated the job descriptions to more accurately depict the duties of the position.

Budget Impact: None.

Exhibits: Exhibit A: Income Tax Clerk Position Description

Recommendation: Approval

CITY OF FRANKLIN, OHIO
RESOLUTION 2024-15

AMENDING THE POSITION DESCRIPTION FOR THE FULL-TIME INCOME TAX CLERK

WHEREAS, Section 8.08 of the Franklin City Charter requires this Council to adopt a Position Classification Plan containing position descriptions for all City positions, considering the duties, authority and responsibility of each position;

WHEREAS, this Council adopted a Position Classification Plan and position descriptions on August 18, 2003; and

WHEREAS, upon the request and recommendation of the City Manager/Personnel Director, this Council now finds it desirable to update the position descriptions for the full-time Income Tax Clerk;

NOW, THEREFORE, BE IT RESOLVED by the Council of the City of Franklin, Ohio, a majority of members of Council present concurring, that:

Section 1. The position description for Income Tax Clerk is hereby amended as shown in the attached Exhibit A.

Section 2. It is found that all formal actions of this Council concerning and relating to the adoption of this Resolution were adopted in an open meeting of this council, and that all deliberations of this Council that resulted in this formal action were in meetings open to the public in compliance with all legal requirements, including Section 121.22 of the Ohio Revised Code, and the Rules of Council.

Section 3. That this resolution shall become effective immediately upon its passage.

ADOPTED: March 4, 2024

ATTEST: _____
Khristi Dunn, Clerk of Council

APPROVED: _____
Brent Centers, Mayor

CERTIFICATE

I, the undersigned Clerk of Council for the Franklin City Council, do hereby certify that the foregoing is a true and correct copy of a resolution passed by that body on March 4, 2024.

Khristi Dunn, Clerk of Council



CITY OF FRANKLIN
An Equal Opportunity Employer
POSITION DESCRIPTION

Employee Name:		Division:	Finance
Civil Service Status:	Classified	Position Title:	Income Tax Clerk
Employment:	Full-time	Reports To:	Income Tax Administrator
FLSA Status:	Non-exempt	Supervises:	N/A

QUALIFICATIONS:

~~High school diploma or equivalent; training and/or experience in office practices and procedures; training and/or experience in bookkeeping or accounting.~~

LICENSURE OR CERTIFICATION REQUIREMENTS:

~~None.~~

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

~~Computer, calculator, fax machine, typewriter.~~

MINIMUM ACCEPTABLE CHARACTERISTICS: ~~(* indicates developed after employment)~~

~~**Knowledge of:** basic accounting; bookkeeping; departmental goals and objectives; departmental policies and procedures; public relations; office practices and procedures; records management; payroll procedures.~~

~~**Skill in:** data entry; computer operation; adding machine or calculator operation; use of modern office equipment, Microsoft Office.~~

~~**Ability to:** multitask, dealing with many variables while determining and taking specific action; carry out detailed, but basic, written or oral instructions; read, copy and record figures accurately; add, subtract, multiply and divide whole numbers; complete routine forms; prepare accurate documentation; prepare and maintain detailed records; respond to routine inquiries from public and/or officials; communicate effectively; maintain records according to established procedures; answer routine telephone inquiries; develop and maintain effective working relationships; handle confidential employee and administrative information with tact and discretion.~~

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

~~1. Maintains records of tax receipts and refunds; prepare and audit income tax forms; collects money and posts daily receipts; prepares bank deposits; waits on customers, processes accounts and grants extensions; type statements, statistical tabulations and other data; performs clerical work such as typing, filing and answering telephones; assists in other areas of the Finance Department as assigned or required.~~

~~2. Cross trains with payroll and accounts payable and will assist with both departments as needed. This will consist of reconciling bank statements, process purchase orders and checks, process payroll, record revenues, and complete income tax returns.~~

~~3. Meets all job safety requirements and all applicable OSHA safety standards that pertain to essential functions.~~



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~~4. Demonstrates regular and predictable attendance.~~

~~OTHER DUTIES AND RESPONSIBILITIES:~~

~~5. Performs other duties as required.~~

~~INHERENTLY HAZARDOUS OR PHYSICALLY DEMANDING WORKING CONDITIONS: (For purposes of O.R.C. 4167)~~

~~1. Emergency plans and fire plans.~~

~~2. Compressed gases.~~

~~3. Portable fire extinguishers.~~

~~4. Handling of materials and supplies (includes mechanical handling equipment, that manner in which things are stored, and housekeeping).~~

~~5. Hazardous chemicals.~~

~~GENERAL DUTY: SAFE AND HEALTHFUL WORKPLACE:~~

~~The employee:~~

~~1. Works in or around crowds.~~

~~2. Has contact with potentially violent or emotionally distraught persons.~~

~~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.~~

(Signature of Appointing Authority/Designee)

(Date)

(Signature of Employee)

(Date)



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POSITION DESCRIPTION

Employee Name:		Division:	Finance
Civil Service Status:	Classified	Position Title:	Income Tax Clerk
Employment:	Full-time	Reports To:	Income Tax Administrator
FLSA Status:	Non-exempt	Supervises:	N/A

GENERAL DESCRIPTION: Executes a wide range of duties in support of City-wide collection of municipal income tax for individual and business taxpayers.

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

1. Under supervision, supports City-wide collection of municipal income tax for individual and business taxpayers in accordance with the City income tax ordinance.
2. Helps foster positive community relations by providing excellent customer service. Responds to inquiries and advises taxpayers/tax preparers regarding basic tax related issues and resolves routine tax problems. Refers in-depth challenges to Income Tax Administrator.
3. Prepares and audits income tax forms, processes and files returns, collects tax payments, records daily receipts, maintains taxpayers accounts, and administers taxpayer correspondence.
4. Assists citizens with tax preparation as requested.
5. Prepares and completes deposits.
6. Disseminates provisions of the income tax ordinance for public information purposes.
7. Maintains, organizes, and protects accurate records of highly confidential information related to City tax filers in accordance with required procedures. Strictly adheres to established practices of confidentiality. Handles confidential information with tact and discretion.
8. Cross trains to support finance and utility billing divisions. Assists in all areas of Finance Department as assigned.
9. Provides clerical support including but not limited to, work, data entry, filing, answering phones, and compiling statistical tabulations.

OTHER DUTIES AND RESPONSIBILITIES:

1. Performs other duties as required.

QUALIFICATIONS:

Communication Skills: Ability to understand a variety of written and/or verbal instructions, and income tax regulations. Ability to respond to routine and sensitive inquiries from the public and/or officials, apply active listening skills, maintain effective working relationships and resolve problems. Ability to deal effectively with confrontational individuals and/or challenging situations.

Education and Experience: High School diploma with coursework in business or general finance, or minimum of one year (1) year experience in tax payments or collections or equivalent combination of education, experience, and training which provides the required knowledge, skills, and abilities. Knowledge of basic office practices and accounting required. Ability to prepare forms and maintain



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records according to established procedures and perform clerical and mathematical duties without error. General familiarity of income tax code as it relates to City, State, and Federal tax returns beneficial.

Equipment, Tools and Materials: Use of calculator, computer, copier, scanner, folder inserter machine, telephone, postage machine, and other standard modern business office equipment.

Math skills: Ability to read, copy and record figures accurately. Ability to add, subtract, multiply, and divide whole numbers, and to calculate fractions, decimals, and percentages.

Physical Requirements: (with or without accommodation): Ability to frequently grasp, carry, hold, stand, walk, and use keyboard. Ability to occasionally lift, reach, stoop, and turn. Specific vision abilities required by this job include close vision and distance vision. Ability to speak English and hear required.

Technical Skills: Ability to use e-mail, word processing, spreadsheets and associated formulas, and video conferencing software. Ability to learn automated system functions used in carrying out job duties. Ability to operate in a network environment. General knowledge of PC equipment, modern office practices and procedures and computer related software required.

INHERENTLY HAZARDOUS OR PHYSICALLY DEMANDING WORKING CONDITIONS: (For purposes of O.R.C. 4167)
Employee has exposure to chemical compounds found in an office environment (e.g., toner, correction fluid, etc.). In accordance with the U.S. Department of Labor physical demands strength ratings, this is considered light work. The constant stress and strain of maintaining a production rate pace, can be and is physically demanding of a worker even though the amount of force exerted is negligible. 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.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily, and must demonstrate the necessary skills, knowledge, and abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The above reflects general information considered necessary to describe the essential functions of the job and shall not be construed as an exhaustive statement of duties, responsibilities or requirements that may be inherent in the job. It is not intended to limit the right of any supervisor to assign, direct, or control the work of employees under his/her supervision. The use of a particular expression to describe duties shall not be held to exclude other duties not mentioned that are of similar kind or level of difficulty.

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.

(Signature of Appointing Authority/Designee)

(Date)

(Signature of Employee)

(Date)