



## **TAX CUSTOMER SERVICE SUPERVISOR**

### General Statement of Duties

Performs difficult, skilled technical work overseeing and participating in the listing of real and business personal property for tax purposes, the appraising and auditing of business personal property, and coordinate the preparation of records for tax billing.

### Distinguishing Features of the Class

An employee in this class performs supervisory and technical work overseeing the listing of real and business personal property for tax purposes and the preparation of records for the billing process. The employee is also responsible for managing the functions of the business personal property appraisal and assessment program. The employee coordinates the efforts of a group of support staff engaged in highly specialized tax functions including listing real properties, listing and assessing vehicles, processing business personal property tax statements and coordinating the annual listing and assessing of business property such as machinery, equipment, vehicles, furniture and fixtures. Work also includes answering questions, supervising and handling public contact functions in the office, preparing records for tax bills, conducting audits of business personal property, and updating records accordingly. Work involves public contact and may involve controversial and appealable decisions. Work requires independent judgment and initiative. Work is performed under the regular supervision of the Billing and Collection Manager and evaluated through periodic conferences, quality of work, review of records and documents and feedback from public.

### Duties and Responsibilities

#### Essential Duties and Tasks

- Supervises and participates in the listing of annual taxable assets of real estate and business and manufacturing firms, including large complex machinery processes, office equipment, tools, vehicles, acquisitions made during previous year and other properties leased, rented or removed; processes listings received in mail; grants listing extensions as appropriate; enters listing forms and data into data base; ensures that properties are billed at correct valuation.
- Assists taxpayers in person, via email, by telephone or written correspondence.
- Performs and prepares releases, discoveries, and other corrections to the primary data base from which bills are prepared; codes and maintains elderly and disabled exemption files.
- Maintains the DMV database for the Department.
- Maintains control files, rates; updates with fees for solid waste.

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- Processes tax utility file; updates and maintains control file, rates, districts and parcels.
- Reviews and processes applications for exempt properties (churches, homestead, civic, farm use etc.); makes recommendations to Tax Administrator; notifies owner if granted or not.
- Reviews and makes sure tax scrolls are up to date; reviews check scrolls to insure that they balance.
- Processes General Ledger extracts for billing files (personal, real and utility properties).
- Processes tax bills for personal, real and utility properties.
- Trains and reviews work of subordinate staff; administers or provides recommendations for personnel matters such as recruiting, interviewing, hiring, training, scheduling, granting leave, performance reviews and disciplinary action, etc.
- Prepares and generates a variety of records and reports such as reports for municipalities, rescue squads, fire departments, valuation reports, reports required for the State, etc.
- Enters changes from discoveries found by auditor.
- Purchases supplies as needed.
- Performs special projects for the Tax Administrator including setting up database for annexations by municipalities, or working with municipalities to establish special taxing districts.

Additional Job Duties

- Provides backup to other staff as needed.
- Performs related duties as required.

Recruitment and Selection Guidelines

Knowledge, Skills, and Abilities

- Considerable knowledge of the laws, principles, practices and standards for appraising business personal property.
- Considerable knowledge of principles, practices and techniques used in listing and assessing farm, residential, commercial and industrial properties.
- Considerable knowledge of the North Carolina Machinery Act and local laws regarding the listing of real and personal property for tax purposes.
- Considerable knowledge of the different steps involved in listing, processing, and discovering of real and personal property for tax purposes.
- Considerable knowledge of current equipment and inventory costs including machinery and vehicles.
- Considerable knowledge of modern office procedures, forms and information technology used in the preparation of office records.

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- Considerable knowledge of the procedures, forms, record keeping and reports of the Department.
- Considerable knowledge of the principles and practices of modern and effective supervision including motivations, communications, leadership, conflict resolution, and performance coaching and evaluation.
- Working knowledge of the Department's personnel, purchasing and budgeting policies and procedures.
- Working knowledge of computer operations to support the business personal property and tax billing systems.
- General knowledge of accounting practices and principles.
- General knowledge of the geographic layout of the County.
- Ability to plan and supervise the work of staff employees.
- Ability to deal tactfully and courteously with the general public.
- Ability to analyze factors influencing the value of business personal property and exercise judgment in the determination of values.
- Ability to generate and document required records and reports.
- Ability to establish and maintain effective working relationships with peers, supervisors, employees in other County departments and the general public.

Physical Requirements

- Work requires the exertion of up to 10 pounds of force occasionally and a negligible amount of force frequently or constantly to move objects.
- Work requires, walking, fingering, grasping, and repetitive motions; vocal communication is required for expressing or exchanging ideas by means of the spoken word and to receive detailed information through oral communications and/or to make fine distinctions in sound.
- Hearing is required to perceive information at normal spoken word levels.
- Visual acuity is required for close vision, distance vision, ability to adjust focus, preparing and analyzing written or computer data, operation of machines, visual inspection involving small defects and/or small parts, using measuring devices, operating motor vehicles or equipment, determining the accuracy and thoroughness of work, and observing general surroundings and activities.
- Worker is not subject to adverse environmental conditions.
- Work is generally in a moderately noisy location (e.g. business office, light traffic).

Desirable Education and Experience

Graduation from a two-year college with a degree in business, accounting or related field and moderate experience in business and personal property listing; or an equivalent combination of education and experience.

Special Requirements

Possession of a valid North Carolina driver's license upon hire.  
Complete Personal Property Listing and Assessment Training at the NCDOR within one year of employment.

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Obtain N.C Business Personal Property Appraiser Certification from NCDOR within one year of employment.

Complete required 30 hours of continuing education training every two years.

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Special Note: This generic class description gives an overview of the job class, its essential job functions, and recommended job requirements. However, for each individual position assigned to this class, there is available a completed job questionnaire with a physical abilities checklist which can give further details about that one specific position. Those documents should be reviewed before initiating a selection process. They can provide additional detailed information on which to base various personnel actions and can assist management in making legal and defensible personnel decisions.