



## Job Specification

<b>Job Title: Tax Examiner 3</b>	<b>FLSA Type: Non-Exempt</b>	<b>Date Established: 3/27/2025</b>
<b>Department: OCFO</b>	<b>EEO Code: 5</b>	<b>Date Revised:</b>
<b>Class Code: 13208005</b>	<b>Reports To: Supervisory Tax Examiner</b>	<b>Date Approved:</b>

### Job Summary

Under general supervision, the Tax Examiner 3 plans and completes tax investigations and analyses. Key services include but are not limited to: determining tax liability; examining tax returns; assessing assets; reviewing payroll records of vendors, contractors, and other parties that do business with the City of Detroit; interviewing financial stakeholders; discussing issues, tax laws, and regulations with taxpayers; assisting with payment arrangements and tax collection; submitting findings for supervisory review; and performing related research and investigative duties as assigned.

### Essential Duties and Responsibilities *(may perform other duties as assigned)*

- Investigate and identify irregularities or discrepancies in posting, record keeping, controls, or operations of a specific area
- Contact taxpayers by mail, telephone, or on-site to address discrepancies and to request supporting documentation
- Ability to analyze different tax types, including Personal Property, NEZ, OPRA, CRA, IFT, etc.
- Learn all necessary software, including DPP.net, TAX.net, Oracle Fusion, Smartsheet, among others
- Learn all necessary payment channel platforms including DivDat, Paymentus, and Lockbox
- Possess very good skills in Excel, internet research, professional business interaction, and organized presentation of materials
- Provide quality customer service
- Prepare and submit monthly metric activities to Supervisor
- Perform special projects, often assisting the lead if project requires
- Participating in the planning, directing, and coordinating the examination of specific significant complex issues
- Provide support for other agents and specialists assigned to examine and determine tax liability
- Develop effective relationships with other departments and divisions with respect to accounts receivable, property tax billing, etc.
- Prepare weekly reports
- Other duties as assigned

### Qualifications (required):

- Bachelor's degree, from an accredited college or university, in finance, business administration, or related field, and/or equivalent combination of education, certification, and experience.

- Minimum of three years of demonstrated experience in business process and systems support, which includes business systems analysis, design, and system testing.
- Demonstrated skills in gathering, translating, documenting, and prioritizing customer requested requirements.
- Experience in facilitating meetings and proficient in written communication skills.

*Equivalent combinations of education and experience may be substituted to meet the education and experience requirements of this position*

### **Knowledge, Skills, and Abilities**

Knowledge of:

- City of Detroit Charter, and State Tax Commission (as needed for Property Tax-related work), uniform rules, regulations, guidelines, and policies related to the area of work
- Federal and state laws, rules, guidelines, policies, and precedents related to the area of work
- Conducting investigative interviewing, writing reports, and making public contacts
- Procedures used in collecting delinquent accounts
- Techniques commonly used in locating errors in accounting records
- Office practices and procedures and routine office supplies and equipment
- Basic and commonly used accounting, budget, or other financial management procedures, methods, and techniques associated with clerical types of duties to perform routine and repetitive tasks while learning how to perform the full range of such tasks found in the work area
- Basic information that must be present in documents terminology, forms, or reports that are part of the transaction
- Structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar
- Principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Administrative and clerical procedures and systems such as word processing, managing files and records, designing forms, and other office procedures and terminology
- Basic arithmetic and algebra and their applications
- Personal computer capabilities and the application of computer systems to issues of format and content in City and departmental financial management
- Tax processing software such as City Tax, Chase Edge, and BS&A Tax.net, and DPP.net

Skill in:

- Use of personal computers
- Use of Microsoft Office (e.g. Word, Excel, Access, PowerPoint) and other office or financial suite software packages
- Use of Excel (e.g. Formulas, Pivot Tables, VLOOKUP, HLOOKUP, other functions, charts, tables) and other financial management software packages functionality
- Use of large complex, multi-departmental financial systems, and demonstrate the knowledge required to interpret resulting financial and accounting reports, summaries and budgets
- Interpersonal skills to interact effectively with personal contacts in a business-like, customer service oriented manner, and maintain favorable public relations
- Understanding written sentences and paragraphs related to work
- Talking to others to convey information effectively
- Verbal and written communications, specifically relating to technical tax information
- Interviewing techniques to conduct informational interviews of taxpayers and professionals

- Recognizing problems and initiating corrective action using logical decision-making techniques
- Presenting concise information to a variety of audiences

Ability to:

- Interpret and apply laws, regulations, and administrative policy
- Collect, interpret, and analyze information from a variety of sources; apply criteria and draw conclusions
- Understand and follow oral and written instructions
- Handle stressful situations relating to investigation, collection, and default situations
- Obtain and utilize sensitive information discreetly and objectively
- Learn and use contemporary financial management software and other related software for program and financial management systems
- Interact effectively with senior leadership, subordinates, department personnel, and others with tact and diplomacy
- Listen to and understand information and ideas presented through spoken words and sentences
- Communicate information and ideas in speaking so others will understand
- Tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem
- Apply general rules to specific problems to produce answers that make sense
- Combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events)
- Arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations)
- Use Tax processing software such as City Tax, Chase Edge, and BS&N Tax.net
- Work as part of a team

#### **Licenses, Certifications, and Other Special Requirements:**

Candidates considered for placement in this classification may be subject to a Criminal Background Investigation based on the requirements of the position.

#### **Physical Demands**

The employee generally remains in a stationary position for an extended period of time operating standard office equipment which may include computers, telephones, photocopiers, and fax machines. The employee is expected to move about to accomplish tasks such as opening file cabinets and moving files. Must be able to lift, push, pull, and carry up to 20 pounds.

#### **Work Environment**

Work is performed primarily in an office environment. Some work requires travel to meetings, conferences, and other work sites with exposure to seasonal weather conditions.

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*The above statements reflect the general nature and level of work performed by employees assigned to this class. Incumbents may be required to perform job-related responsibilities and tasks other than those stated in this specification. Essential duties may vary from position to position.*

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