

# RUTHERFORD COUNTY, TENNESSEE

## CLASSIFICATION SPECIFICATION

**CLASSIFICATION TITLE:**

**Deputy Trustee – Tax Freeze**

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### **PURPOSE OF CLASSIFICATION**

The purpose of this classification is to coordinate tax freeze program associated with the Rutherford County Trustee office by processing, reviewing, scanning, and submitting all tax freeze applications to the State of Tennessee and to the Assessor of Property; send/receive additional documents to the State and/or the Assessor of Property; verify accuracy of all information; maintain applications and coordinate future appointments. Requires excellent customer service skills, problem solving abilities, and basic bookkeeping skills. Reports directly to the Chief Deputy Trustee.

### **ESSENTIAL FUNCTIONS**

**The following duties are normal for this position. The omission of specific statements of the duties does not exclude them from the classification if the work is similar, related, or a logical assignment for this classification. Other duties may be required and assigned.**

Performs customer service functions; provides information/assistance regarding department services, activities, procedures, or other issues; distributes forms, letters, and documents as needed; responds to routine questions, complaints, or requests for service; initiates problem resolution; processes all tax payments; schedules appointments for tax freeze and tax relief programs.

Performs general clerical tasks, which may include making copies, distributing documentation, sending/ receiving faxes, incoming and outgoing calls, and updating department documents.

Performs administrative work associated with the Rutherford County Trustee office to include compiling and maintaining records of accounts and reports, collecting taxes, providing customers with information regarding special programs including Tax Freeze, processing returned mail, and processing tax payments.

Operates a computer to enter, scan, review or modify data; perform data entry functions by keying data into the computer; verify accuracy of entered data and make corrections; utilize word, excel, internet, email or other computer programs.

Communicates with mortgage companies, title searchers, title companies, tax customers, other departments, and other individuals to exchange information or resolve problems.

Conducts research functions as needed for various customers either by phone, scan, or fax.

Processes applications for tax freeze, requiring all documents related to each.

Serves as a resource of information for the public and other employees within the department and County; maintain an effective working relationship with the public and co-workers.

### **Special assignments may include the following:**

Counts and balances the cash box daily.

Processes mail to be sent to customers.

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Enters data from the Chancery Court back tax payment report on a monthly basis.

Develops and projects annual budget; makes budgetary recommendations; prepare balance sheets; monitor expenditures to ensure compliance with approved budget; order and maintain all office supplies and equipment; correspond with the Trustee for budget amendments; initiate requests/purchase orders for new or replacement supplies and/ or equipment; submit all bills to be paid to the Finance Department.

Initiates a delinquent tax report and prints tax bills; coordinates with the Trustee as to the frequency; ensures all related inventory is available.

Compiles office inventory and coordinates with the records in the fixed assets department.

Retrieves/sends messages from the Cisco phone system.

Coordinates with the Trustee for advertising in the newspaper; maintains/updates current ads.

Reviews, researches, scan, and processes all return mail; utilizes all resources and attempts the mailing with a different address.

Serves as a resource of information for the public and other employees regarding bankruptcy; compiles and prepares documents regarding bankruptcy to turn over to county attorneys; files bankruptcy claims; processes bankruptcy payments received from courts; codes all claims correctly.

### **ADDITIONAL FUNCTIONS**

Performs other related duties as required.

### **MINIMUM QUALIFICATIONS**

High school diploma or GED; supplemented by 2 years previous administrative experience and/or experience working in a Trustee's office; or any equivalent combination of education, training, and experience which provides the requisite knowledge, skills, and abilities for this job. Preferred proficiency in Microsoft Excel, Image Ease scanning, and Internet use. Preferred experience with completing Federal Income taxes, bookkeeping, and real estate values/appraisals. Must possess and maintain a valid Tennessee driver's license.

### **PERFORMANCE APTITUDES**

**Data Utilization:** Requires the ability to review, classify, categorize, prioritize, and/or analyze data. Includes exercising discretion in determining data classification, and in referencing such analysis to established standards for the purpose of recognizing actual or probable interactive effects and relationships. Must possess a comprehensive knowledge of the terminology used within the department and be able to determine, decipher, organize, prepare and maintain an assortment of legal documents and information in an effective manner associated with the preparation of applicant's transaction.

**Human Interaction:** Requires the ability to provide guidance, assistance, and/or interpretation to others regarding the application of procedures and standards to specific situations. Must be able to communicate effectively with supervisors and other staff members.

**Equipment, Machinery, Tools, and Materials Utilization:** Requires the ability to operate, maneuver and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential functions. Requires the knowledge and ability to operate various machinery including a cash register, computer, printer, typewriter, calculator, copy machine, facsimile machine, telephone, etc.

**Verbal Aptitude:** Requires the ability to utilize a wide variety of reference, descriptive, and/or advisory data and information.

**Mathematical Aptitude:** Requires the ability to perform addition, subtraction, multiplication, and division; the ability to calculate decimals and percentages; the ability to utilize principles of fractions; and the ability to interpret graphs. Requires the mathematical ability to handle required calculations.

**Functional Reasoning:** Requires the ability to apply principles of rational systems; to interpret instructions furnished in written, oral, diagrammatic, or schedule form; and to exercise independent judgment to adopt or modify methods and standards to meet variations in assigned objectives. Requires the ability to plan, organize, and prioritize daily assignments and work activities and to utilize and understand computer applications and techniques as necessary in the completion of daily assignments. Requires the knowledge of software programs relevant to position.

**Situational Reasoning:** Requires the ability to exercise judgment, decisiveness and creativity in situations involving evaluation of information against measurable or verifiable criteria. Requires the ability to comprehend and apply regulations and procedures of the department and be capable of working under a minimum degree of stress related to duties that require constant attention to detail and tight deadlines.

## **ADA COMPLIANCE/ PHYSICAL DEMANDS ANALYSIS**

**Physical Ability:** Tasks require the regular and, at times, sustained performance of moderately physically demanding work, typically involving some combination of climbing and balancing, stooping, kneeling, crouching, and crawling, and that may involve the lifting, carrying, pushing, and/or pulling of moderately heavy objects and materials (20-50 pounds).

**Sensory Requirements:** Some tasks require the ability to perceive and discriminate colors or shades of colors, odor, depth, texture, and visual cues or signals. Some tasks require the ability to communicate orally.

**Environmental Factors:** Performance of essential functions may require exposure to adverse environmental conditions, such as dirt, dust, pollen, odors, wetness, fumes, temperature and noise extremes, machinery, vibrations, electric currents, traffic hazards, toxic agents, disease, or pathogenic substances.

### **PHYSICAL DEMANDS ANALYSIS**

**1. STANDING AND WALKING**

**Surface:** concrete and carpet

**Estimated Total Hours:** 1-2

**2. SITTING**

**Tasks:** sitting in a desk chair

**Estimated Total Hours:** 7.5 **Maximum Continuous Time:** 3-5

**3. LIFTING/CARRYING**

**Objects:** paper, boxes, files

Weight	Hourly	Daily	Weekly	Monthly	Never
<10 lbs				X	
11-25 lbs					X
26-50 lbs					X
51-75 lbs					X
76-100 lbs					X
>100 lbs					X

**4. PUSHING/PULLING**

**Objects:** boxes of envelopes and paper

**Height of hands above floor during push:** 3 feet max

**5. REACHING**

**Tasks:** reaching across the desk to pick up applications and paperwork

**Hands Used:** RIGHT LEFT **BOTH X**

Distance	Direction	Frequency	Duration	Avg. Weight
0-20"				
21-36"	To the side/ forward	Daily	As needed	paper

**6. WORK CONDITIONS**

Exposure to	Yes	No
Hot Temperatures		X
Cold Temperatures		X
Sudden Changes in Temperature		X
Noise		X
Fumes		X
Cramped Quarters		X
Cold Surfaces		X
Hot Surfaces		X
Sharp Edges		X
Vibration		X
Fluorescent Lighting	X	
Computer Monitor Screen Glare	X	

Inside Building	<u>100</u> % of time
Outside	_____ % of time

**7. OTHER JOB DEMANDS**

Does Job Require	Yes	No
Crawling		X
Jumping		X
Lying on Back		X
Lying on Stomach		X
Twisting	X	
Sweeping/Mopping		X
General Cleaning		X
Handling Trash		X

**8. LIST TOOLS, EQUIPMENT AND MATERIALS USED**

Enter office machines

**9. HAND USE**

Type of Use	Yes	No	Frequency
Keystrokes	X		Hourly
Grasp	X		Occasionally
Fine Motor i.e: writing, twisting hands or wrist, etc	X		hourly

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Rutherford County, Tennessee, is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the County will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer. Signatures below indicate the receipt and review of this classification description by the employee assigned to the position and the immediate supervisor.

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Employee's Signature

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date