



HUMBLE INDEPENDENT SCHOOL DISTRICT

Job Description

ASSISTANT TAX ASSESSOR/COLLECTOR

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Reports to: Director of Treasury and Property Tax Administration
School/Department: Tax Office
Pay Grade: Administrative Management Pay Grade 3
Wage/hour status: Exempt
Created/revised: January 21, 2015

Primary Purpose:

To administer the timely and accurate preparation, processing, recording, reconciliation and reporting of the district's property tax roll in accordance with District policy, generally accepted accounting principles and the Texas Property Tax Code.

Qualifications:

Education/Certification:

- Bachelor's degree in Accounting from an accredited college or university recognized by the US Department of Education
- Certified by and in good standing with the Texas Department of Licensing and Regulation as a registered RTC or RTA or be willing to obtain this certification

Special Knowledge/Skills

- Knowledge of the Texas Property Tax Code
- Skill to analyze and evaluate the tax roll
- Knowledge of Governmental Accounting
- Knowledge of generally accepted accounting principles and practices
- Advanced analytical, organizational, communicational, and interpersonal skills
- Skill in the use of keyboarding, Microsoft Word, Power Point, Excel financial systems (MUNIS preferred), and tax system software (Spindlemedia preferred)
- Skill in analyzing financial activities and applying appropriate resolution to problem situations
- Skill in mathematical calculations, data entry, and ten key calculator
- Skill in detailed numeric/clerical work and processing high volume transactions
- Ability to prioritize tasks and coordinate multiple projects to meet specific deadlines
- Ability to maintain confidentiality of privileged and sensitive information
- Ability to maintain professional behavior, appearance, and work ethic to represent the District in a positive manner at all times and work in a team environment
- Ability to communicate effectively with tact and diplomacy and provide a high level of customer service to administrators, District officials and employees, co-workers, tax payers and outside organizations



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Experience:

- 1-3 years of tax office or accounting experience
- School district or tax collection related experience preferred

Major Responsibilities and Duties:

Assessment Process

1. Continue Education for Tax Assessor/Collector certification
2. Attend legislative updates and seminars relating to changes to assessment and collection policies and recommend procedures necessary to keep tax office up to date.
3. Understand the appraisal standards and how the appraisal district operates; understand the role of the appraisal review board and it works.
4. Update tax system with current and prior years Supplemental and Correction rolls received monthly from HCAD.
5. Reconcile Tax Summary Reports Monthly with HCAD's Report for current and prior years.
6. Assist in the calculation and publication of the effective tax rate.
7. Assist in the preparation of appropriate reports to the Board of Trustees.
8. Work with Tax Software Company to maintain correct working operations of our system and load updates when available.
9. Process lock box payments and investigate any discrepancies with bank lock box dept.
10. Research overpayments and underpayments resulting from the processing of daily lock box activity.
11. Maintain accurate records for tax system and revise as necessary.
12. Train staff on updates to Tax Office System.
13. Review current procedures and communicate with office staff on methods to develop improved procedures.
14. Maintain accurate records for Bankruptcy filings and keep in close contact daily with Delinquent Tax Attorneys Bankruptcy Department.
15. Reconcile and prepare refunds or statements after running Roll Corrections, Supplementals and Name/Address Corrections
16. Prepare Current Year Files and Delinquent Files for Tax Services monthly.
17. Prepare Files for all Mortgage Company Requests with over 1,000 accounts in November.
18. Process Quarterly Payer's statements and send agreements to taxpayers paying in installments.
19. Prepare frozen levy reports and verify that frozen over-65 or disability exemption is in place.
20. Ensure that Frozen levies continue to be prepared correctly. Develop processes for handling special situations arising from frozen accounts.
21. Ensure the Appraisal District receives their quarterly payment on time.
22. Prepare attorneys fees for payment monthly.
23. Prepare 1978 values for timber accounts and adjust accounts. Maintain worksheet on timbers for use with preparation of the annual Property Value Study and for review by auditors.



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24. Review litigated accounts received from the appraisal district and update tax roll accordingly.
Prepare any litigated refunds as necessary.
25. Prepare certified statements for delinquent tax attorneys for accounts under lawsuit.
26. Prepare current year mortgage company requests for less than 1,000 accounts.
27. Prepare current year account codes with multiple owners or agents.
28. Prepare for end of year storage.
29. Review accounts with codes that need to be removed for current year.
30. Prepare information for board item for the deletion of account years due to the statute of limitations.
31. Perform all other duties as assigned, and as it relates to the process of assessing and collecting for the school district.

General Duties

32. Provide excellent customer service.
33. Supervise office functions in the absence of the Tax Assessor/Collector
34. Resolve taxpayer issues that arise on property located in Humble ISD; amount of taxes due, statements generated, etc.
35. Resolve legal questions about accounts in regard to the Texas State Property Tax Code.
36. Work with delinquent Tax Attorneys on payments, suits, bankruptcy etc. on a daily basis.
37. Track and maintain quarterly payments and deferred accounts.
38. Secure office and the safe at the end of the day.
39. Assist in the preparation of the yearly budget for department.
40. Ensure business machines in tax office are maintained properly and in good working order.
41. Maintain time sheets on employees and coordinate working schedules
42. Review and maintain inventory of tax office supplies.
43. Develop and maintain retention schedule for all tax documents and correspondence.
44. Maintain tax office storage in archives and coordinate shredding of documents annually.
45. Develop and maintain updated Tax Office Policy & Procedures manual.
46. Reconcile tax collections with General Ledger accounts.

Payment Process

47. Coordinate implementation of any new systems for the improvement of processing payments.
48. Supervise the daily deposit preparation process; ensure that cash receipts are deposited daily.
49. Assist in the testing and implementation of applicable tax software.
50. Prepare refund forms for accounts that have an over-payment or duplicate payment.
51. Ensure that all correspondence, receipts and statements for that day are delivered to document center for mailing.
52. Monitor payment agreements.
53. Coordinate refund process.



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Policy, Reports, and Law

1. Compile, maintain and file all reports, records and other documents required.
2. Comply with policies established by federal and state law, the Texas Property Tax Code, and local board policy

Communication

1. Maintain a positive and effective relationship with coworkers, supervisor, District officials and employees, taxpayers, vendors, and outside agencies and organizations
2. Provide outstanding customer service
3. Maintain good judgment and decision making when dealing with supervisor, co-workers, District officials and employees, taxpayers, vendors, and outside agencies and organizations

Other

1. Maintain confidentiality of privileged and sensitive information when received and distributed to appropriate designees as directed by the Financial Services Division.
2. Attend meetings as required
3. Maintain an organized work environment
4. Maintain a professional appearance
5. Adaptable to new procedures and changes

Mental Demands/Physical Demands/Environmental Factors

Maintain emotional control under stress

Occasional prolonged and irregular work hours

Occasional travel outside of school district boundaries

Workload is deadline driven

Prolonged use of equipment and computer with repetitive hand motions

Frequent contact with community and/or other district/campus employees

Daily attendance and punctuality are essential functions of the job

Equipment Use

Tax Office Software by Spindlemedia Inc., Dell PC, HP printer, Xerox copier 5820, Billcon Check Endorser/Money Counter, Pitney Bowes Postage machine, Sharp calculator, HP Brother fax machine

The foregoing statements describe the general purpose and responsibilities assigned to this job and are not an exhaustive list of all responsibilities and duties that may be assigned or skills that may be required.

Approved by _____ Date _____

Reviewed by _____ Date _____