

DISCLAIMER: This document is an actual job description used in a county in Tennessee. It has not been reviewed by CTAS for accuracy or compliance with law. Users are urged to consult with their county attorney for legal advice and guidance in developing specific job descriptions for their particular county office.

_____ COUNTY, TENNESSEE
CLASSIFICATION SPECIFICATION

CLASSIFICATION TITLE: ASSISTANT CHIEF DEPUTY TRUSTEE

FLSA STATUS: NON-EXEMPT

PURPOSE OF CLASSIFICATION

The purpose of this classification is to perform administrative work associated with the _____ County Trustee office. Duties and responsibilities include compiling and maintaining records of accounts and reports, collecting taxes, processing all warrants for the Trustee's office, balancing receipts and reports with the Chief Deputy, handling tax corrections, managing tax pick ups and public utilities, updating the Board of Equalization Documents, handling banking functions, and assuming responsibility in the absence of the Chief Deputy Trustee. 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; process all tax payments; schedule 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.

Operates a computer to enter, scan, review or modify data; performs data entry functions by keying data into the computer; verify accuracy of entered data and make corrections; utilize word processing, research, 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 or by fax.

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

Special assignments may include the following:

Balances and records all tax receipts by separating each type of tax into partials, pickups, public utilities, and refund groups. Match report totals by calculating a refund total to determine daily total of receipts; reconciling the receipt payment report to the daily tax totals.

Runs receipt history report and transaction report to record and file.

Enters all warrants into the Local Gov software from Chief Deputy's warrant report then balances the warrants with the reconciliation report.

Conducts tax corrections by comparing information from the computer tax roll with the property assessor order; confirm the assessor's previous appraisal information and contact information matches the computer tax roll. Calculates the new tax and mails the new bill to the taxpayer.

Adds new assessments to the tax role.

Updates changes and makes corrections from the State Board of Equalization documents.

Issues tax relief credit vouchers (ACV) and matching credits for each tax year.

Reconciles the ACV payments from the State of Tennessee as compared to the tax credit given on the payment.

Bids certificates of deposits by notifying all local banks of upcoming bids and updating the banks with the summary of all bids.

Prepares a report of the summary of investments for the Trustee to present to the Budget committee.

Balances monthly bank statements with check registers.

Balances tax collections monthly.

Runs general purpose schools and federal warrant reconciliation reports for the Chief Deputy.

Enters data for school reports.

Compiles monthly transaction reports for State Auditors.

Assists the Finance Director in preparing the Top 10 Taxpayer list every year.

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

Balances and reconciles annual delinquent taxes; prepares documents for Trustee, Delinquent Tax Attorney, and Chancery Court for delinquent collection.

ADDITIONAL FUNCTIONS

Assists Chief Deputy in their absence to assume role responsibility as directed which includes but is not limited to daily balancing of monies; daily deposit; compiling, sending, and receiving information from local banks on certificates of deposits; retrieves daily warrants and funds bank account; handles return checks and refunds.

Plans, organizes, and inspects the work of others under the direction of the Chief Deputy.

Performs other duties as required.

MINIMUM QUALIFICATIONS

High school diploma or GED; preferably supplemented by 1 year 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. 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.

Human Interaction: Requires the ability to provide guidance, assistance, and/or interpretation to others regarding the application of procedures and standards to specific situations.

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.

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; ability to calculate decimals and percentages; may include ability to perform mathematical operations with fractions.

Functional Reasoning: Requires the ability to apply principles of influence systems, such as motivation, incentive, and leadership, and to exercise independent judgment to apply facts and principles for developing approaches and techniques to resolve problems.

Situational Reasoning: Requires the ability to exercise judgment, decisiveness and creativity in situations involving evaluation of information against sensory, judgmental, or subjective criteria, as opposed to that which is clearly measurable or verifiable.

ADA COMPLIANCE/PHYSICAL DEMANDS ANALYSIS

Physical Ability: Tasks require the ability to exert light physical effort in sedentary to light work, but which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5-10 pounds). Tasks may involve extended periods of time at a keyboard or work station.

Sensory Requirements: Some tasks require the ability to perceive and discriminate visual cues or signals. Some tasks require the ability to communicate orally.

Environmental Factors: Essential functions are regularly performed without exposure to adverse environmental conditions.

PHYSICAL DEMANDS ANALYSIS

1. STANDING AND WALKING

Tasks: receiving and distributing various items within the Trustee's office and finance office.

Surface: concrete floor, stairs to the second floor

Estimated Total Hours: .5

2. SITTING

Tasks: daily desk work

Estimated Total Hours: 7

3. LIFTING/CARRYING

Objects: boxing up materials and moving to storage closet as needed.

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

4. PUSHING/PULLING

Objects: Moving boxes around storage areas, tax rolls

Height of hands above floor during push: 5 to 5 ½ feet

5. CLIMBING

Tasks: retrieving boxes in storage

Device: chair

Height: 6 to 7 feet

Frequency: 1 or 2 times a year

6. BENDING/SQUATTING/KNEELING

Tasks: filing receipts in filing cabinets

Frequency: occasionally, as needed depending on the height of the filing cabinet

7. REACHING

Tasks: using scanner, opening filing cabinet

Hands Used: RIGHT X LEFT BOTH

Distance	Direction	Frequency	Duration	Avg. Weight
0-20"	Right	Often		
21-36"				

8. 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	100 % of time
Outside	% of time

9. OTHER JOB DEMANDS

Does Job Require	Yes	No
Crawling		X
Jumping		X
Lying on Back		X
Lying on Stomach		X
Twisting	X	
Sweeping/Mopping	Occasionally, but not required	X
General Cleaning	X	
Handling Trash		X

10. LIST TOOLS, EQUIPMENT AND MATERIALS USED

Pen, computer, scissors, stapler, calculator, staple puller, ruler

11. HAND USE

Type of Use	Yes	No	Frequency
Keystrokes	X		Computer- daily
Grasp	X		Pens- often
Fine Motor i.e: writing, twisting hands or wrist, etc	X		Often

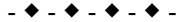
Exemption Status Tests

Exemption Status Test (Administrative Employee)

~ Answer the following to determine whether a worker is misclassified as an exempt administrative employee:

1. Is the employee's primary duty performing office or non-manual work directly related to the management or general business operations of the employer or the employer's customers?
2. Does the employee exercise discretion and independent judgment with respect to matters of significance? That is, does he evaluate and compare possible courses of action and then make a decision or recommendation after considering the various possibilities?
3. Is the employee paid the equivalent of at least \$455 per week on a salary basis?

YES	NO	Don't Know
	✓	
✓		
✓		



_____ 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.

Employee's Signature

Supervisor's Signature

Date

Date