City of Kansas City, Missouri
Job Class Specification

Job Title: TAXPAYER SPECIALIST **Department:** FINANCE

Job Code: 1138 **Status:** NONEXEMPT **Grade:** L-6

Summary

This is a specialized position involving a high volume of direct contact with taxpayers dealing with issues related to complex tax, licensing and fee transactions for the City of Kansas City, Missouri in the Finance Department. Work involves processing tax return information and payments as well as educating taxpayers on the City's taxes. Taxpayer Specialists' duties revolve around the collection of delinquent taxes for the City of Kansas City, assessing, billing and collecting real estate and special use taxes, assisting business owners with obtaining and/or renewing business licenses with the City of Kansas City, registering businesses for all applicable tax, license or fee accounts, and processing tax returns, payments and clearances.

Employees in this classification are responsible for handling incoming and outgoing correspondence regarding the earnings, withholding, emergency, arena, business license, convention and tourism taxes and other taxes collected. Work also involves explanation of the City tax ordinances, regulations, policies and procedures to accountants, attorneys, business owners, payroll companies and the general public; researching and determining delinquent tax obligations; calculating and assessing taxpayers for taxes owed, including penalties and interest; negotiating tax payment agreements within established guidelines.

Work is performed under the general supervision of technical superiors, supervisors and/or managers. Employees assigned to this classification work with independence and judgment, in accordance with city and departmental policies and regulations. Work is evaluated through review of duties performed according to established performance standards and measures.

Duties and Responsibilities

- Handle incoming and outgoing telephone calls, emails, and faxes regarding city taxes, special assessments and business licenses and registrations.
- Understand and explain City ordinances, regulations, policies and procedures to taxpayers, accountants, attorneys, business owners and the general public regarding taxes, special assessments, licenses and fees collected, educating the public.
- Research delinquent tax obligations to locate taxpayers and to determine the amount of taxes owed.
- Examine taxpayer documentation and prepare assessment notices or collection referrals.
- Work with outside vendors, including the Division's lockbox vendor, collection agency, and others as needed to ensure that tax returns and payments are posted in an accurate and timely manner
- Research and correct tax returns and payments that, due to taxpayer error or system requirements, are not systematically posted to taxpayer accounts
- Complete administrative duties as necessary for the efficient operation of the Division, including processing incoming or outgoing mail, scanning taxpayer documents, etc., as needed
- Generate and mail system prepared notices to taxpayers who have delinquencies; compose and prepare written communications to taxpayer as needed.
- Assist the public by handling complex taxpayer issues and complaints.

Duties and Responsibilities (continued)

- Maintain a working knowledge of laws, regulations, policies, procedures and guidelines applicable to the collection of taxes.
- Utilize the Revenue Division's integrated tax system to research and update tax accounts and to assist taxpayers with the online customer portal.
- Process penalty and interest, write-offs, credits, offsets and other complex tax transactions.
- Update, maintain, and close taxpayer's accounts and cases.
- Prepares billings for property and/or special assessment payments.
- Processes real estate and special assessment payments.
- Discerns when it is appropriate to refer customers to other sections and divisions in the Finance Department, other city departments and other governmental entities.
- Understand and accurately apply NAICS codes to business service areas and functions when setting up new accounts.
- Understand the different kinds of accounts associated with business licenses and when those accounts are due and payable to the city.
- Review and process requests for tax clearances.
- Be familiar with other documentation and clearances/license that business owners must acquire prior to the issuance of a license.
- Performs related duties as required.

Technical Skills

Considerable knowledge of:
Modern office principles, practices, and equipment.
Investigation techniques, methods, and procedures.
Municipal ordinances and regulations.
Professional telephone etiquette and techniques.
Business English, reading comprehension, grammar and spelling, and basic math.

Ability to:
Establish and maintain positive and effective working relationships with the general public, city officials and staff.
Dedicate oneself to providing highest quality services to meet the needs and requirements of internal and external customers.
Handle angry, hostile, and difficult customers
Confront and resolve conflict
Respect diversity of individuals, listen to their concerns and be open to new ideas and constructive criticism.
Exercise independent judgment, be flexible and adaptable.
Organize work activities and develop efficient work processes.
Orchestrate multiple activities to accomplish a goal.
Use resources effectively and efficiently.
Cope with a changing work environment.
Prepare clear and concise letters, memos and routine reports.
Make computations and calculations involving applications of accounting principles
Project a professional appearance.

Skill in:
Organizing, compiling and recording information accurately.
Personal computer operations, including multiple databases and office suite packages.

Required to:
Sign and adhere to confidentiality agreement.

Education and Experience	High school graduation and three (3) years' experience in customer service work, OR An equivalent combination of education and experience.
Certificates/ Licenses/Special Requirements	▪ Must pass a background check as prescribed by the City. ▪ May be required to be bonded.
Supervisory Responsibility	None
Supervision Received	Work is performed under general supervision.

Note: This job description should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as may be required. Reasonable accommodation will be provided to qualified individuals with disabilities. The City of Kansas City has the right to revise this job description at any time. The job description is not to be construed as a contract for employment.

Created	2/06
Revised	9/06, 8/2022, 9/2025