

FINANCE ASSISTANT

Classification: Admin 3 Clerical Union Position

Definition:

Skilled customer service, detailed record keeping, and data entry work in support of the operations of the Finance Department and all other related work, as required.

Supervision:

The Finance Director is the Department Head responsible for all activity within the Finance Department.

For accounting duties performed by the Finance Assistant, general supervision is provided by the Assistant Town Accountant. Position performs independently with regard to routine work, referring all questions to the Assistant Town Accountant.

For assessing duties performed by the Finance Assistant, general supervision is provided by the Principal Assessor. Position performs independently with regard to routine work, referring all questions to the Principal Assessor.

For treasurer & collector duties performed by the Finance Assistant, general supervision is provided by the Assistant Treasurer/Tax Collector. Position performs independently with regard to routine work, referring all questions to the Assistant Treasurer/Tax Collector.

Position performs a variety of responsible duties which require considerable attention to detail, accuracy and the exercise of judgement in carrying out an entire operation, with guidance and direction from the Finance Director, Treasurer/Tax Collector, Assistant Treasurer/Tax Collector, Assistant Town Accountant and/or Principal Assessor.

All Finance Assistant positions are to be cross-trained as directed by the Finance Director and will be given an area of focus at the Finance Director's Discretion and perform tasks as assigned.

Work Environment:

Work is performed under typical office conditions; work environment is moderately quiet. Workload is subject to predictable seasonal fluctuations.

The employee operates standard office equipment.

The employee has frequent contact with the general public and other town departments. Communication is in person, by telephone, and in writing.

The employee has limited access to confidential information.

Errors could result in monetary loss and legal repercussions; most errors are easily detected and corrected.

Essential Functions:

The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.

Accounting Duties

- Processes payments of bills and payrolls; verifies payments according to statute, town appropriation, and any pertinent contract agreement or proposal.
- Accumulates, calculates, post balances and reconciles data for specific accounts and payroll. Checks against warrant registers; identifies, traces and otherwise resolves discrepancies in accordance with established procedures.
- Processes cash receipts from the Treasurer's office checking for accuracy and proper account numbers.
- Prepares journal entries, performs reconciliation for monthly close and printing of monthly reports including expenditure report for distribution to the departments.
- Interacts with the Treasurer/Collector and Assessing Departments to reconcile and identify adjustments of cash balances, payrolls, tax/excise receivables, abatements, exemptions, etc.
- Processes telephone inquiries from the public, vendors and other departments relative to the routine activities of the department keeping the Finance Director informed.
- Maintains contract and grant files relating to the processing and authority of various bills and payments.
- Performs a variety of clerical functions including data entry, typing of correspondence, reports and other data on computer equipment.
- Data processing functions include troubleshooting software and hardware issues to extent practical with experience in such matters. Performs backup functions related to the Town's windows server. Serves as a liaison between software/hardware vendors, consultants and other departments.
- Other duties as assigned

Assessing Duties

- Assists in the essential data management and public assistance with regard to assessment law. Responds to inquiries in person or on the telephone exercising judgement and initiative with a working knowledge of property assessment
- Conducts research and provides information in the office, by telephone or in writing to property owners and others regarding the Town's assessment policies and procedures
- Reviews property transactions (deeds) as they are received from the Registry of Deeds, determine and assign non-arms length codes to the deeds. Enters deed information into the CAMA system
- Reviews sales data from buyers, sellers and brokers and generates sales reports from deeds
- Assists in maintaining all department files and records including maintaining and updating real and personal property ownership records and files, maintaining Chapter Land files; reviewing all applications, maintaining liens and releases, ensuring all properties have the correct data and are qualified under the three Chapters

- Processes exemption and abatement applications; makes recommendations to the Board of Assessors. Completes abatement and exemption certificates and various reports after action by the Board of Assessors using the tax collection software
- Assists public with tax exemption applications
- Administration of motor vehicle excise tax records.
- Assists the public with excise abatements and processes them. Prepares monthly excise reports for the Finance Director
- Other duties as assigned

Collection & Treasurer Duties

- Receives and processes payments from taxpayers; balances and posts daily payments.
- Assists in the preparation and mailing of various tax bills.
- Prepares weekly and end of month calculations for accounting purposes.
- Responds to requests from the public, mortgage companies and lawyers; responds to complaints and questions from taxpayers; explains tax collection procedures and regulations; assists taxpayers in understanding tax bills and related documents; explains department procedures.
- Conducts research from municipal lien certificates, bankruptcy and other paperwork.
- Accepts and verifies departmental receipts daily, and posts to cash sheet
- Processes vendor checks for mailing and reviews for accuracy
- Prepares Tax-Exempt certificates
- Responds to requests for information
- Other duties as assigned

Additional Office Duties

- Performs various office duties, including processing departmental mail; may retrieve mail from the post office.
- Performs other similar or related duties as required, or as situation dictates.
- Attend trainings as determined by the Finance Director
- Processes various types of forms, applications, reports and other types of information; organizes paperwork; makes copies, and distributes various reports and materials; prepare materials for meetings
- Consistent, regular attendance in the workplace is required.

Recommended Minimum Qualifications

Education and Experience:

High school diploma, Associates Degree preferred; including courses in office procedures, accounting and computers; one to two years of office experience and interacting with the public; experience in municipal government preferred; or an equivalent combination of education and experience.

Knowledge, Ability & Skill: Working knowledge of office practices and procedures, bookkeeping and accounting. Familiarity with municipal tax collection procedures.

Working knowledge of office procedures. Working knowledge of MA state laws on municipal finance and powers and duties (Ch. 40 & 41), demonstrated skill in performing bookkeeping functions, knowledge of computerized finance software, MS Word and intermediate knowledge spreadsheets and MS Excel.

Ability to maintain complex records and prepare reports from such records. Ability to maintain effective accounting procedures. Ability to communicate effectively verbally and in writing. Willingness to learn new procedures and relate well with employees, department heads and public.

Ability to follow instructions. Ability to organize records. Ability to plan, organize and complete tasks in compliance with deadlines. Ability to deal tactfully and appropriately with the general public and town departments, and assist others in an effective manner. Ability to complete arithmetic calculations with speed and accuracy. Ability to use office machines, including adding machines, computers, printers, video display terminals, telephones, copiers, calculators and fax machines.

Skill with computers and related software applications. Good communication, customer service, mathematical and organizational skills.

Physical Qualifications:

Minimal physical effort is generally required to perform duties under typical office conditions. The employee is frequently required to sit and talk or listen, use hands to operate equipment occasionally lift boxes weighing up to 30 pounds. Visual requirements include the ability to read routine and complex documents and view a computer monitor. Balancing, crouching, grasping, pulling, reaching and stooping may also be required.

This job description does not constitute an employment agreement between the employer and employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.