CLASS TITLE: **ASSISTANT TAX SECTION CHIEF (TAXATION**

Class Code: 02682502
Pay Grade: 40A
EO Code: B

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: Within the Department of Revenue (DOR) Division of Taxation, to assist a Tax Section Chief in planning, organizing, coordinating and directing the work of a large staff engaged in (i) assessing/reviewing, (ii) auditing/investigating, or (iii) processing and operationalizing the administration of taxes under the jurisdiction of the Division of Taxation; to supervise and be responsible for the day-to-day work of the assigned functional unit; to assist in monitoring metrics-based functions and performance and to proactively identify and recommend changes and improvements to unit procedures and functions; and to do related work as required.

SUPERVISION RECEIVED: Works under the supervision of a Tax Section Chief; assignments are received with considerable latitude for the exercise of initiative and independent judgment; work is reviewed through conferences and submitted reports for results obtained and conformance to laws, departmental or agency policies, objectives, rules and regulations, and accepted auditing methods, practices and techniques.

SUPERVISION EXERCISED: Plans, organizes, supervises, and reviews the work of a tax section staff engaged in (i) assessing/reviewing, (ii) auditing/investigating, or (iii) processing and operationalizing the administration of taxes.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

Within the Department of Revenue (DOR) Division of Taxation, to assist a Tax Section Chief in planning, organizing, coordinating and directing the work of a large staff engaged in (i) assessing/reviewing, (ii) auditing/investigating, or (iii) processing and operationalizing the administration of taxes under the jurisdiction of the Division of Taxation.

To supervise and be responsible for the day-to-day work of the assigned functional unit.

To assist in monitoring metrics-based functions and performance and to proactively identify and recommend changes and improvements to unit procedures and functions

To develop, initiate and supervise special auditing and/or related investigational programs designed to obtain the maximum determinations of taxpayers' liability.

To assist and support a Tax Section Chief in identifying and developing strategic opportunities for improvement consistent with the Division of Taxation's mission.

To identify training needs within the assigned functional unit and to facilitate and administer training programs to maximize employee competence in the unit.

To conduct hearings, interviews, meetings and/or conferences for the purpose of clarifying or adjudicating matters and, when necessary, to advise on matters pertaining to the interpretation of the various provisions of the tax laws.

To hold meetings with taxpayers, their attorneys and/or accountants and, when unable to resolve controversial or disputed matters within the framework of established law, rules and regulations or policies, to prepare necessary reports thereon for review and further action as required.

To guide staff in the interpretation and application of various provisions of the tax laws, procedures, and policies and to consult with a superior in difficult cases or on matters of law interpretation.

To directly perform and resolve highly complex or contentious matters that arise within the assigned unit.

To assist superiors in the development of policies, rules, and regulations necessary for the enforcement of the various provisions of the tax laws.

Within the Assessment and Review unit:

To assist in planning, organizing, coordinating, directing, and reviewing the work of a staff engaged in the assessment and review of specific taxes under the jurisdiction of the Division of Taxation. Such includes but is not limited to Personal Income Tax, Business Corporation Tax, Sales and Use Tax and other Excise Taxes, Estate Taxes, and any licensing or enforcement related to such taxes.

To conduct informal preliminary interviews and conferences with taxpayers and/or their representatives to clarify and/or address matters regarding tax liabilities.

To do related work as required.

Within the Audit and Investigations unit:

To assist in assigning, planning, coordinating, and directing the work of a professional and clerical staff performing comprehensive audits of accounting and financial records related to taxes administered by the Division of Taxation. Such audits may include audits performed in the field, as desk audits, and/or internal audits related to technical compliance with state and/or federal mandates.

To assist in planning, organizing, coordinating, and reviewing the special field and office investigations of any assigned tax matters resulting from complaints of alleged tax evasion, avoidance, or fraud, especially with respect to the state's excise tax statutory and regulatory mandates.

To assist the Tax Section Chief in managing and overseeing the inspections of cigarette and other tobacco product distributors, dealers, wholesalers, manufacturers, and others subject to the state's excise tax laws and enforcement of such laws.

To do related work as required.

Within the Operations unit:

To assist in overseeing the processing, review, approval, and maintenance of the registration of taxpayers for various taxes administered by the Division of Taxation.

To provide day-to-day oversight of staff receiving and processing physical and electronic tax documents from the initial receipt by electronic filing, mail, or in-person to the recording of the relevant data in the appropriate files.

To ensure the timely processing of remittances by cash, check, and electronic payment methods.

To assist in the maintenance, functionality, and processing of the data involved in large tax systems such as Personal Income Tax, employers' Withholding Tax, Estate Tax, Sale and Use Taxes, Business Corporation Tax, employment taxes, alcoholic beverage taxes, and other taxes and fees administered by the Division of Taxation.

To assist in the administration of compliance programs, efforts related to bankruptcy and receivership actions, and collections matters for the Division of Taxation.

To assist in reviewing the processing systems and make recommendations for increasing their efficiency and effectiveness.

To be responsible for taxpayer experience and services to provide assistance, insight, understanding, and resolution options for taxpayers in relation to taxes administered by the Division of Taxation.

To coordinate the tax processing services with other tax functions and with appropriate state and private agencies.

To assist in supervising the mail, information, and intake functions.

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGE, SKILLS AND CAPACITIES: A knowledge of the provisions of the state tax laws and policies, rules and regulations utilized in their administration, and the ability to apply such knowledge in the supervision of various tax assessment and review, audit and investigations, operational/processing systems; knowledge of the principles, practices and techniques of accounting and the ability to apply such knowledge in the supervision and coordination of the accounting for the receipt and disbursement of funds in accordance with state laws and regulations; the ability to interpret, explain and apply the various provisions of the State's tax laws, rules and regulations; advanced knowledge of Windows Operating Systems, usage of a personal computer (PC) and standard desktop office tools; the ability to assist superior in the development of policies, rules and regulations necessary for the enforcement of the various provisions of the State's tax laws; the ability to establish and maintain effective working relationships with taxpayers and to assess and explain tax determinations made and/or audits performed; the ability to prepare reports detailing progress and recommendations for system improvement; the ability to establish and maintain effective working relationships with a variety of staff and officials; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Possession of a Bachelor's degree from a college of recognized standing with specialization in Accounting or a closely related financial field; and

Experience: A minimum of four (4) years of employment in a responsible supervisory position specializing in tax administration.

Or, Possession of a Master's degree from a college of recognized standing with specialization in Accounting or a closely related financial field and a minimum of two (2) years of employment in a responsible supervisory position specializing in tax administration.

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