

CLASS TITLE:**TAX AIDE I**

Class Code: 02455200

Pay Grade: 16A

EO Code: F

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: To perform a variety of paraprofessional and complex clerical support functions within the Division of Taxation, including the review and adjustment of forms and records, data retrieval, posting payments resulting from billings, notices and levies, etc., and posting and reconciliation of accounts; to interact with taxpayers on routine matters not requiring in-depth analysis, including resolution of common inquiries on tax returns, bills, payments and notices; and to do related work as required.

SUPERVISION RECEIVED: Works under general supervision with some latitude in the application of tax compliance procedures; work is periodically reviewed for conformance with instructions, guidelines, methods and final objectives.

SUPERVISION EXERCISED: Usually none.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

To perform a variety of paraprofessional and complex clerical support functions within the Division of Taxation, including the review and adjustment of forms and records, data retrieval, posting payments resulting from billings, notices and levies, etc., and posting and reconciliation of accounts; to interact with taxpayers on routine matters not requiring in-depth analysis, including resolution of common inquiries on tax returns, bills, payments and notices.

To provide routine information and assistance regarding state tax processes in person, by telephone, or by correspondence to taxpayers and/or their representatives; to handle telephone and in-person requests for general information from the public and other state agencies.

To document complaints and resolve taxpayer problems within the section.

To review tax forms (e.g. levy requests, permit applications) for completeness and accuracy of preparation.

To assist taxpayers in the preparation of various tax forms, including preparation of permits in the registration section, liabilities within the collection section, or similar transactions.

To follow up to employers on proper disposition of wages subject to levy.

To update interest figures on liabilities.

To process approved penalty waivers.

To review checklist for proper procedure of Offers of Compromise, and to approve and forward for final disposition.

To perform various tax functions on a PC System using databases, spreadsheets and word processing software.

To compile statistical data necessary for receipts, accounts receivable and/or section reports; to summarize data and interpret computer records and transactions to taxpayers and/or their representatives; to assist in the maintenance of appropriate agency files and data (paper or computerized).

To assist in the orientation of staff.

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGES, SKILLS AND CAPACITIES: A working knowledge of the forms, processes and transactions of an assigned tax section; a working knowledge of collection processes and payment methods; the ability to resolve routine taxpayer problems and inquiries; the ability to utilize computer software and databases in completing tax transactions and interpreting data; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Such as may have been gained through: graduation from a senior high school, including or supplemented by courses at the level of business math; and

Experience: Such as may have been gained through: employment in a responsible clerical position requiring the review of forms for mathematical accuracy, a familiarity with tax processes and some interaction with the public.

Or, any combination of education and experience that shall be substantially equivalent to the above education and experience.

Class Created: November 19, 2000

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