

CLASS TITLE:**TAX AIDE II**

Class Code: 02455300
Pay Grade: 18A
EO Code: F

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: To provide assistance and authoritative information regarding complex issues concerning state tax laws to taxpayers and their representatives by telephone, correspondence or in person; to interview taxpayers and their representatives in order to determine the nature of their tax problems and to advise as to the best solution to those problems; as assigned, to serve as a leader worker in the performance of a variety of paraprofessional and complex clerical support functions within the scope of a large section in 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 do related work as required.

SUPERVISION RECEIVED: Works under the general supervision of a supervisor from whom assignments are received with some instructions; work is reviewed and evaluated at completion based on the results obtained and on conformance to the laws, regulations and procedures pertaining to the various taxes for which the division is responsible.

SUPERVISION EXERCISED: Leads, mentors and/or trains clerical or paraprofessional workers assigned to assist.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

To provide technical assistance to taxpayers in all areas of Rhode Island personal income tax including, but not limited to, resident status, non-resident and partial year resident filing requirements, estimated tax, servicemen's filing requirements, withholding tax requirements, property tax relief credit and other tax credits.

To provide technical assistance to taxpayers in all areas of the Rhode Island business corporation taxes such as, but not limited to, estimated filing requirements. Due dates and other areas of state taxation such as those involved with the sales and use tax.

To prepare or help taxpayers prepare current, delinquent or amended returns including all supporting attachments such as forms, statements, schedules, affidavits and explanations and to analyze copies of returns, schedules and transcripts of accounts necessary to assist the taxpayer.

To perform a variety of tasks in a large section, such as: processing approved penalty waivers; updating interest figures on liabilities; following up to employees on proper disposition of wages subject to levy; preparing statistical data for receipt, accounts receivable or section reports.

To advise taxpayers concerning their rights to file claims and to assist taxpayers in the effective preparation of such claims.

To explain the requirements for and to assist taxpayers in preparing applications for extensions of time to file various tax returns.

To assist taxpayers in answering requests from tax officials for information, particularly when such requests for information or clarification are made in order to perfect unprocessable returns.

When taxpayer service workload permits, to perform duties in such areas as collections or audits which are commensurate with the duties above.

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

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

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGES, SKILLS AND CAPACITIES: A working knowledge of and the ability to interpret and rapidly recall various state tax laws, regulations, practices and procedures; the ability to meet and deal with taxpayers and their representatives, including stressful situations involving adverse actions on the part of the Division; the ability and judgment to insure that the tax laws, regulations and procedures are interpreted with consistency and equity for all taxpayers; the ability to prepare taxpayer's returns; a familiarity with the basic working of data retrieval systems related to computer processing and the ability to interpret the data so retrieved; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Such as may have been gained through: possession of an Associate's Degree, including or supplemented by courses in business, finances, accounting or taxes; and

Experience: Such as may have been gained through: employment in a responsible position involving the review of tax forms/records and 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

Editorial Review: 3/15/03