

CLASS TITLE: TAXPAYER SERVICE SPECIALIST

Class Code: 02687200
Pay Grade: 23A
EO: B

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: To assist and advise taxpayers in properly filing their state income tax returns, both individual and corporate, through telephone contact and in person; to prepare all tax corrections based on that taxpayer contact as well as correcting other taxpayers' records as required; or as assigned, to be responsible for all clerical/administrative support activities for a major tax function (e.g. field audit or collections); or to be responsible for a public relations program related to taxpayer service; and to do related work as required.

SUPERVISION RECEIVED: Works under the general direction of a superior with latitude for the exercise of independent judgement; work is reviewed through conferences for results and for conformance to laws, regulations and procedures.

SUPERVISION EXERCISED: May supervise the work of paraprofessional and professional personnel assigned to assist; or, as assigned, supervises and reviews the work of a clerical staff of a large section within the Division of Taxation.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

To interview taxpayers and their representatives and determine their income tax situation through the analysis and evaluation of information provided.

To determine what income tax advice is needed and explain probable consequences of various courses of action open to taxpayers for the current and other tax years.

To help taxpayers in the preparation of income tax returns and the establishment and maintenance of records that relate to income tax obligations.

To explain collection and audit procedures to taxpayers.

To provide technical backup for taxpayer service personnel by researching complex tax law or procedural questions which may involve issues that are not clearly defined.

To meet with new business persons to explain the various tax returns and obligations for which they are responsible and provide ongoing tax assistance and advice, as needed.

To assist taxpayers having questions or having received notices about their accounts or the technical accuracy of their returns by explaining the problem, taking corrective action and advising the taxpayer of the best course of action.

To advise taxpayers before an audit or collection proceeding has been initiated as to what information they should have available and provide other relevant information.

To handle difficult and complex taxpayer service contacts including taxpayers dissatisfied with the assistance furnished or with tax assertions and computations.

To be responsible for a public relations program including personal and media appearances before groups and organizations and interviewing taxpayers with input about the system.

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGES, SKILLS AND CAPACITIES: A working knowledge of state law and regulations applicable to individual income tax, corporation tax and a general knowledge of other state taxes and the ability to apply this knowledge in determining a taxpayer's total tax situation, isolating potential tax issues and applying appropriate tax laws and regulations to an individual case; a working knowledge of basic accounting principles; a working knowledge of Division of Taxation forms, notices and other

documents and the ability to identify, evaluate and extract information from a variety of documents; a thorough knowledge of the Division's organizations and functions; a working knowledge of common business practices in the local area; the ability to use data retrieval systems to perform research, initiate correspondence and input necessary corrections to taxpayer accounts; the ability to use alternative courses of action open to the taxpayer; ability to meet and deal with individual taxpayers and groups of taxpayers and to effectively convey necessary technical or general information about the tax laws and the services available to taxpayers at the Division; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Such as may have been gained through: graduation from a college of recognized standing with a Bachelor's Degree in accounting, finance, business, or a closely related field; and

Experience: Such as may have been gained through: employment in a responsible capacity in government or private industry which involved accounting, public relations and/or the preparation and filing of tax returns or reports of individual, partnership or corporate business organizations.

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

Class Revised: November 19, 2000

Editorial Review: 3-15-2003