

9983

TAXPAYER SERVICE REPRESENTATIVE

Nature of Work

Under general supervision, performs full-performance work providing services to taxpayers such as assisting in the preparation of tax return forms; answering inquiries concerning taxes; explaining tax laws, administrative rules, court rulings and department policies to potential taxpayers. Responds to complex and technical inquiries and must be knowledgeable about all taxes administered by the State Tax Department. May be assigned to a regional tax office to provide the same taxpayer services. May train other personnel. Performs related work as required.

Examples of Work

Answers general complex correspondence which requires a broad tax knowledge and may be required to conduct legal research.

Responds to all types of taxpayer inquiries; enters, reviews and/or updates information.

Interprets and explains agency policies, administrative policies, legislative changes, court rulings and other matters pertaining to the taxpayer.

Assists taxpayers in completing tax returns for any of the taxes administered by the agency.

Compiles statistics and prepares reports pertaining to job activities.

Answers telephone, email and walk-in inquiries pertaining to taxes, bad checks, liens, warrants and other tax documents.

Participates in training sessions to learn new and/or changes in tax laws and policies.

Directs clerical personnel in the typing and preparation of correspondence.

May appear before civic groups to explain tax procedures and other items of interest in the field of taxation.

Knowledge, Skills and Abilities

Knowledge of accounting principles, practices and concepts.

Knowledge of the laws, regulations, policies and procedures pertaining to all taxes administered by the State Tax Department.

Skill in explaining complicated tax matters to taxpayers.

Ability to converse in a professional manner with disgruntled taxpayers.

Ability to establish and maintain effective working relationships.

Ability to deal with highly sensitive issues in an orderly and controlled manner.

Ability to explain all tax matters in multiple formats.

Minimum Qualifications

Training: Bachelor's degree from a regionally accredited college or university.

Substitution: Full-time or equivalent part-time paid experience in taxation, bookkeeping, collections, accounting or tax preparation may substitute for the required training on a year-for-year basis.

Experience as a call-center based customer service representative may substitute for the required training at the rate of two years of experience for one year of training.

Promotion Only: Four years of full-time or equivalent part-time paid experience as a Tax Audit Clerk, Tax Audit Clerk Senior or a Revenue Agent 1 in the State Tax Department may substitute for the required training.

Established: 08/19/1993

Revised: 05/10/2005; 08/21/2017

Effective: 08/21/2017