

Class Concept

The major purpose of this position is to perform technical and audit functions by reviewing and analyzing data in the assigned tax schedules of individual income, sales and use, and withholding. The position makes technical determinations based upon taxpayer records and established procedures that require an accurate analysis of data and situations to draw sound conclusions which result in effective courses of action. The work involves reviewing tax returns and related documents for completeness and accuracy. The position accesses taxpayer account information and enters information into a computerized tax system and adheres to departmental rules and regulations. This position should handle the majority of incoming calls from taxpayers with questions on filing reports, notices received, account balances and adjustments, including the correct application of penalty and interest.

This position provides technical assistance to the departments through processing amended returns, reviewing items, and responding to calls and correspondence received from taxpayers and their representatives. This position will review assigned returns timely to identify errors and then initiate correspondence as needed in order to perform reviews based upon the books and records from the taxpayer, or from information obtained from other sources, such as the Internal Revenue Service. In some cases, review of businesses may also be performed. Taxpayers use different accounting and record-keeping systems that requires the position to evaluate the tax information, and record the relevant data, in order to determine the most accurate and effective manner in which to complete the review and determine the proper tax due. The position may also conduct reviews that involve some illegal activity, or tax protestors. As a result the position must maintain their fraud awareness. The position also provides technical support for senior and advanced personnel. Work involves educating and assisting taxpayers in the area of tax compliance and reporting procedures to ensure compliance with tax laws.

These positions are responsible for working with multiple tax schedules, which include corporate income and franchise, individual income, motor vehicle lease, sales and use, withholding, scrap tire, white goods, sales utilities, etc. They are credited with considerable independence in their day to day responsibilities. Often this position is a step towards internal growth to a Tax Auditor or Revenue Officer position.

Recruitment Standards

Knowledge, Skills, and Abilities

- Considerable knowledge of business and accounting principles.
- Working knowledge of the corporate income and franchise, individual income, motor vehicle lease, sales and use, scrap tire, white goods and withholding tax schedules.
- Ability to investigate beyond what is reported on a tax return, or to detect situation where the potential exists for taxes to be understated or expenses/deduction to be overstated, is required.
- Excellent communication and interpersonal skills to interact effectively with taxpayers and their representatives to communicate review findings, bases for conclusions reached, including interpretations of tax law, administrative code, and divisions' technical advice memorandums and directives is required. Strong analytical skills.
- Ability to be proficient on DOR and third-party computer applications and systems.
- Basic knowledge of taxation principles and terminology.

Minimum Education and Experience

Associate's degree in Business Administration, Accounting or related field from an appropriately accredited institution, and one year work experience preferably in an accounting-related environment or an equivalent combination of education and experience.