

INCOME TAX SERVICE SPECIALIST II

NATURE OF WORK IN THIS CLASS:

This is technical and clerical work involving the processing and preliminary examination of income and withholding tax returns.

Employees in this class perform the full range of processing functions of the moderately complex types of tax returns, forms and schedules of individuals. Employees work under minimum supervision and have delegated responsibility for actions or decisions made within the limits of their authority and in accordance with program guidelines.

ILLUSTRATIVE EXAMPLES OF WORK: (These examples do not list all the duties that may be performed; any one position may not include all the duties listed.)

Processes individual income tax returns with business income and schedules covering capital gains and losses, special tax computation and other similar forms and schedules requiring detailed processing procedures.

Reviews and verifies all entries and arithmetical computations on the return for completeness and accuracy. Makes necessary adjustments in tax liability based on the entries made on the return by the taxpayer, and initiates form notices to taxpayer advising of the additional tax to be assessed or the overpayment to be refunded, or to request for additional information or document.

Initiates referred reports to Tax Audit Branch, Intelligence Branch or Collection Branch for further examination or action on the returns that appear to have invalid claims, with potential fraud issues or are delinquent.

Prepares supplemental refund, abatement, offset debit and credit on appropriate forms based on additional information provided by the taxpayer and in accordance with established procedures.

Assists taxpayers who come to the office in the preparation of standard individual income tax forms; explains tax laws and regulations with respect to reporting and the processing procedures; gives out tax forms, schedules, instructions and related materials; responds to taxpayer inquiries regarding form notices issued by the Department and on other tax processing and reporting matters.

Participates in taxpayer education programs and may be called upon to speak before a group, organization or media concerning the dissemination of tax information.

Maintains records and prepares reports.

Operates adding/calculating machine.

Performs related duties as required.

MINIMUM KNOWLEDGE, ABILITIES, AND SKILLS:

Knowledge of tax laws and regulations governing the types of returns processed.

Knowledge of income tax forms, schedules and documents pertinent in the processing of income tax returns.

Knowledge of standard office practice.

Knowledge of arithmetic.

Ability to interpret and apply pertinent tax laws, regulations, procedures and other program guidelines.

Ability to verify entries and arithmetical computations on detailed tax forms and schedules for completeness and accuracy.

Ability to make decisions in accordance with appropriate program guidelines.

Ability to work effectively with the public and employees.

Ability to communicate effectively, orally and in writing.

Ability to operate adding/calculating machine.

Ability to maintain confidential information.

Ability to maintain records and prepare reports.

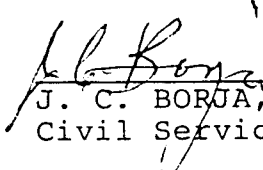
MINIMUM EXPERIENCE AND TRAINING:

a) Two years of experience in the technical processing and examination of income tax returns and graduation from high school; or

b) Any equivalent combination of experience and training which provides the minimum knowledge, abilities and skills.

ESTABLISHED: October, 1984

PAY RANGE: 29



J. C. BORJA, Executive Director,
Civil Service Commission