

INCOME TAX SERVICE SPECIALIST I

NATURE OF WORK IN THIS CLASS:

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

Employees in this class receive on-the-job training to gain technical subject matter knowledge during the normal on-the-job training period. The kinds of returns processed are simple individual Forms 1040. Employees verify and determine tax liability based on the taxpayer's entries on the returns. After the training period, the employees receive general instructions relative to work procedures and requirements, changes in policies and procedures, and interpretation of tax laws and regulations. Except for developmental assignments, employees work under minimum supervision.

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 simple individual income tax returns, such as Form 1040A, 1040EZ and 1040 returns which utilize income averaging, credit for child and dependent care expenses, deduction for married couple when both work and other similar schedules; examines the returns for completeness of identifying information, required signatures and additional documents; verifies exemptions count and corrects if in error; checks for additional exemptions due to age or blindness; compares wages and withholding on Form W-2 with entries on returns; verifies the accuracy of entries on the returns; verifies the arithmetic accuracy of tax liability as determined by the taxpayer based on the information provided on the returns; corrects errors, initiating form error notices to taxpayers which show the additional tax to be assessed or the overpayment to be refunded. Initiates form notices to taxpayers for additional information or document needed.

Helps taxpayers prepare simple standard individual income tax returns; explains the 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 in bills and notices issued by the Branch.

Maintains withholding tax listings; computes and verifies tax computations; reconciles payments.

Maintains records and prepares routine reports.

Performs related duties as required.

MINIMUM KNOWLEDGE, ABILITIES AND SKILLS:

Knowledge of standard office practice.

Knowledge of arithmetic.

Ability to learn and apply tax laws and regulations governing the types of returns processed.

Ability to learn and apply income tax processing and examination techniques and procedures.

Ability to learn the use of the various tax forms and schedules.

Ability to follow oral and written instructions.

Ability to make decisions in accordance with program guidelines.

Ability to work effectively with the public and employees.

Ability to operate adding/calculating machines.

Ability to communicate effectively, orally and in writing.

Ability to maintain confidential information.

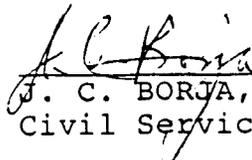
Ability to maintain records and prepare reports.

MINIMUM EXPERIENCE AND TRAINING:

- a) Two years of technical experience in work involving arithmetic computations and the application of technical regulations to determine liability, program eligibility, validity of claims or similar work; bookkeeping; or related work; 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: 23



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