

INCOME TAX SERVICE SPECIALIST III

NATURE OF WORK IN THIS CLASS:

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

Employees in this class perform the full range of processing and examinations of complex tax returns and documents, including Corporation, Partnership, Trust, and Individual returns. Employees also assist the branch supervisor in providing technical advice and guidance to lower level specialists and have delegated responsibility for a segment of work.

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.)

Functions as the Withholding Tax Program Specialist and have delegated day-to-day technical responsibility for the examination and processing of withholding returns; assigns work and advises supervisor of workload and of special problems encountered; reviews documents prepared by lower level specialists before final approval for supervisor's signature.

Serves as a technical specialist delegated day-to-day technical responsibility for furnishing advice and assistance and making spot-check review of the examination and processing of the varied income tax returns by lower level specialists; advises supervisor of workload and of special problems encountered.

Processes and examines the most complex tax returns and documents, including Corporation, Partnership, Trust, Individual returns. Makes sure the returns are filed with all the required tax forms. Reviews all entries and verifies arithmetic computations to insure accuracy; recomputes tax liability based on entries made and any additional information provided by the taxpayer; initiates form notices advising taxpayers of any additional tax to be assessed or the overpayment to be refunded, or to request for additional information or document.

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.

Develops and instructs in taxpayer education programs sponsored by the Department, and may make public appearances on behalf

of the Department before a group, organization or the media.

Serves as the focal point for resolving taxpayer problems which cannot readily be resolved by the lower level specialists.

Keeps informed of current regulations and directives in order to keep other specialists and the public advised.

Researches tax law or procedural questions which frequently involve issues not clearly defined.

Maintains records and prepares reports.

Performs related duties as required.

MINIMUM KNOWLEDGE, ABILITIES, AND SKILLS:

Knowledge of tax laws and regulations governing Corporation, Partnership, Fiduciary, Individual, Withholding and other types of returns processed.

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

Knowledge of standard office practice.

Knowledge of arithmetic.

Ability to lead and provide technical advice and guidance to lower level specialists.

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

Ability to examine entries and verify 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 employees and the public.

Ability to maintain confidential information.

Ability to communicate effectively, orally and in writing.

Ability to operate adding/calculating machine.

Ability to maintain records and prepare reports.

MINIMUM EXPERIENCE AND TRAINING:

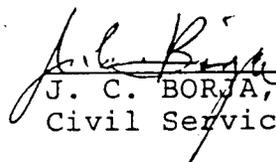
a) Four years of experience in the technical processing and

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: 31



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