

Minimum Qualification Specifications
for the Class:

TAX INFORMATION SPECIALIST I

Basic Education/Experience Requirements

Graduation from an accredited four (4) year college or university with a bachelor's degree.

Excess work experience as described under General Experience, below, or any other responsible administrative, professional or analytical work experience that provided knowledge, skills and abilities comparable to those acquired in four (4) years of successful study while completing a college or university curriculum leading to a baccalaureate degree may be substituted on a year-for-year basis. To be acceptable, the experience must have been of such scope, level and quality as to assure the possession of comparable knowledge, skills and abilities.

The education or experience background must also demonstrate the ability to write clear and comprehensive reports and other documents; read and interpret complex written material; and solve complex problems logically and systematically.

Experience Requirement

Applicants must have had the kind, quality and amount of experience indicated in the paragraphs below, or any equivalent combination of training and experience.

General Experience: One and one-half (1-1/2) years of responsible professional work experience which involved the interpretation and application of municipal, state or federal tax laws, rules and regulations as they apply to such taxes as general excise, real property, personal income, and corporation. The experience must demonstrate knowledge of various tax laws, rules and regulations, operations and procedures; and the ability to review, analyze and interpret tax laws, rules and regulations, legal opinions, court decisions, and other pertinent documents affecting taxes; and explain orally and in writing tax laws, rules and regulations. Such ability can be demonstrated through experience requiring writing narrative reports and personal contacts with others (e.g., clients, inquirers to provide timely and authoritative information regarding tax requirements and regulations.

Qualifying Experience - Examples of experience which will be credited as meeting the General Experience requirement include, but are not limited to the following:

- A. Experience gained with an accounting firm, government, or in the accounting or legal department or program of a private organization involving such work activity as tax assessing, tax auditing, tax planning, analysis and determination of tax liabilities;
- B. Experience in a tax program with responsibility for an internal information program involving a systematic preparation, distribution and maintenance of administrative directives, policy statements, decisions, rulings, changes in tax laws and other tax related information to facilitate and ensure uniform interpretation and application of tax laws and procedures;
- C. Experience in a tax program with responsibility for planning and directing taxpayer assistance and services programs involving responsibility for providing authoritative, prompt, courteous responses on taxpayer requests and inquiries received via telephone, walk-ins, and correspondence on such taxpayer concerns as assistance in preparing returns, interpretation of notices and communications; preparation of adjustment requests; tax clearances, etc. Activities in this area may also include taxpayer education activities involving such functions as speaking to special groups such as senior citizens, and college classes to explain programs, procedures and tax laws.

Non-Qualifying Experience - Examples of experience which will not be credited as meeting the General Experience requirement include:

- A. Experience in a tax program limited to clerical processing of tax information, documents or payments will not be accepted as qualifying.
- B. Experience as a periodic or part-time employee which involved, as a primary activity, preparation of individual income tax returns on a routine pre-determined format will not be accepted as qualifying.
- C. Professional level work, such as performed in administrative staff support services, i.e., personnel or fiscal, although such work may have been performed in a tax program if it did not require substantive involvement in tax laws interpretation and application, is not qualifying.

Substitutions Allowed

- 1. A master's or doctorate degree from an accredited four year college or university with a major in accounting or finance which included course work in tax laws may be substituted for one (1) year of General Experience.
- 2. A Certified Public Accountant Certificate obtained through a written test may be substituted for one (1) year of General Experience.

3. A law degree from a school of law accredited by a nationally recognized specialized accrediting body (or a law degree that is deemed comparable by a nationally recognized specialized accrediting body), which included course work in tax laws may be substituted for one (1) year of General Experience.

Quality of Experience

Possession of the required number of years of experience will not in itself be accepted as proof of qualification for a position. The applicant's overall experience must have been of such scope and level of responsibility as to conclusively demonstrate that he/she has the ability to perform the duties of the position for which he/she is being considered.

Selective Certification

Specialized knowledge, skills and abilities may be required to perform the duties of some positions. For such positions, Selective Certification Requirements may be established and certification may be restricted to eligibles who possess the pertinent experience and/or training required to perform the duties of the position.

Agencies requesting selective certification must show the connection between the kind of training and/or experience on which they wish to base selective certification and the duties of the position to be filled.

Tests

Applicants may be required to qualify on an appropriate examination.

Physical and Medical Requirements

Applicants must be able to perform the essential functions of the position effectively and safely, with or without reasonable accommodation.

This is an amendment to the minimum qualification specifications for the class TAX INFORMATION SPECIALIST I, which were approved on January 22, 1982.

DATE APPROVED: 7/8/2013



BARBARA A. KRIEG, Director
Department of Human Resources Development