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Class Specifications
for the Class:

TAXPAYER SERVICES MANAGER

Class Distinguishers:

Complexity: This class reflects a branch chief responsible for managing the taxpayer services program in the State's principal tax district. The work involves planning, developing, coordinating and evaluating programs for the provision of taxpayer assistance and information concerning tax laws and filing requirements; the issuance of various tax licenses and tax clearances; and public education and information. The position in this class is also responsible for overseeing the provision of highly technical tax assistance and issuance of letter rulings in response to taxpayer inquiries, and the development of new and revised tax forms and instructions for the department.

The work requires an understanding of tax laws, rules, departmental operations, functions, and procedures for general tax law interpretations and the ability to understand tax applications sufficiently to keep abreast with new and amended tax laws to discuss a wide range of technical tax matters with all departmental personnel, and speak knowledgeably to tax professionals, special interest groups, and the general public. Highly technical tax decisions and determinations which require interpretation of tax laws or policy issues are overseen by other tax specialist personnel responsible for program policy development.

Personal Contacts: Personal contacts are frequent and include participating in meetings with attorneys, certified public accountants, and others to discuss technical tax inquiries; personnel of the Internal Revenue Service and other State agencies to coordinate joint and other tax activities; conferring with other departmental personnel to plan and coordinate effective taxpayer services; representatives of various media; and the taxpaying public, as necessary, to respond to inquiries.

Supervision Exercised: The position in this class supervises a staff of professional, technical and clerical positions through subordinate supervisors.

Supervision Received: The position works under the general supervision of the administrator of the Tax Services and Processing Division, with wide authority and responsibility for execution of branch programs.

Full Performance Knowledge and Abilities: *(Knowledge and abilities required for full performance in this class.)*

Knowledge of: State and related federal tax laws, rules and regulations sufficient for broad interpretations; methods and techniques of editing and writing materials for publication through various media; State and related federal tax forms and filing requirements; departmental operations, policies and procedures; public relations; and principles and practices of supervision.

Ability to: Plan, develop, direct and coordinate programs and activities for taxpayer services and assistance, development of tax forms, responses to highly technical tax inquiries from taxpayers, public education and public relations, and issuance of tax licenses and clearances; prepare effective and informative articles and materials for publication through various media; edit materials prepared by others; analyze and evaluate information and make sound recommendations; understand, evaluate and explain technical tax information; speak before groups, individuals and the media; cooperate with others; establish and maintain effective working relationships and public relations; and supervise the work of others.

Examples of Duties: *(The sole position in this class may not be assigned all of the duties listed, nor do the examples necessarily include all the duties that may be assigned. The omission of specific statements does not preclude management from assigning such duties. The classification of a position should not be based solely on the examples of duties performed.)*

1. Plan, develop, coordinate and evaluate taxpayer services programs for the State.

2. Develop long- and short-range plans for programs and activities related to the issuance of technical letter rulings, development of State tax forms, taxpayer education and information services, tax licenses and clearances, tax information services, divisional staff training, and public relations activities.

3. Direct the development and issuance of letter rulings based on policy established by the Director’s office; and coordinate procedures with the departmental Rules Office and tax audit and collection personnel to ensure accuracy and

consistency of actions.

4. Plan and direct taxpayer education, information and training programs for the interpretation and explanation of tax laws, rules, filing requirements, procedures, etc., for professional groups, special interest groups, tax preparers, and the general public.

5. Oversee the planning and coordinating of the development of new State tax forms and instructions, and the revision of existing forms and instructions; review forms for completeness and consistency with other forms; and ensure timely issuance and distribution of forms to taxpayers.

6. Oversee the processing, issuance and updating of all tax licenses and permits.

7. Oversee departmental public affairs/media program activities; provide input for media responses and actions; and speak on behalf of the department on public interest issues and reactions.

8. Direct and oversee training programs conducted for division personnel to ensure accuracy and completeness of information and timeliness of training.

9. Confer with departmental branch and division heads to determine educational and informational needs of taxpayers; plan and direct the development of necessary training and informational materials (e.g., flyers, booklets, magazine articles, computer CDs, etc.); schedule educational/training sessions and the dissemination of informational material within sufficient time before tax filing deadlines.

10. Edit informational materials prepared by subordinates for accuracy and consistency with departmental objectives.

11. Review all technical letter rulings for consistency with the department’s objectives and for determining needs for new policy or revision of existing policies.

12. Advise joint taxpayer education programs with federal and State government agencies and organizations on matters concerning State tax laws, rules, procedures, etc.; and coordinate the development of joint activities such as joint tax licensing and clearance forms.

13. Establish work priorities and schedules for regular and special work assignments.

14. Respond to and resolve taxpayer complaints and problems referred by subordinates.

15. Review proposed departmental rules, tax information releases and announcements, etc., and recommend changes for improvements.

16. Assign, review and evaluate the work of subordinates.

17. Identify and address training needs of the branch; recommend approval of personnel actions; and review, investigate and resolve personnel problems and take appropriate disciplinary action.

18. Participate in the preparation of the branch budget.

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This is the first specification for the new class TAXPAYER SERVICES MANAGER.

Effective Date: 03/16/97

DATE APPROVED: 2/15/00 /s/Diana H. Kaapu
For MIKE McCARTNEY
Director of Human Resources Development