



COMMONWEALTH OF KENTUCKY JOB CLASS SPECIFICATION

TAXPAYER SERVICES SPECIALIST III

Job Number: 20001798
Job Code: 95390V230916
Job Group: 9500 - REVENUE
Job Established: 02/16/1990
Job Revised: 09/16/2023

Grade: 14	<u>Salary (MIN - MID):</u>	<u>Special Entrance Rate:</u>
	\$22,602-\$33,903 - Hourly	NONE
	\$3,672.84-\$5,509.24 - 37.5 Hr. Monthly Salary	NONE
	\$3,917.68-\$5,876.52 - 40 Hr. Monthly Salary	NONE

PROBATIONARY PERIOD:

This job has an initial and promotional probationary period of 6 months, except as provided in KRS 18A.111.

CHARACTERISTICS OF THE JOB: *Characteristics of a job are general statements indicating the level of responsibility and discretion of positions in that job classification. These are not intended to be an exhaustive list.*

Provides expert technical assistance to taxpayers and staff on state tax statutes and regulations administered by the Department of Revenue or the Department of Vehicle Regulation. Leads and performs in- depth reviews of tax returns for certain purposes, to include, but not limited to the investigation and compliance of tax returns in the enforcement of tax laws; the examination of tax returns, applications, and related documentation to determine accuracy; and/or the collection of delinquent tax and state government debts; and performs other duties as required.

MINIMUM REQUIREMENTS:

EDUCATION:

Graduate of a college or university with a bachelor's degree.

EXPERIENCE, TRAINING, OR SKILLS:

Must have four years of professional experience in tax records examination, tax administration, tax investigation, or tax auditing. One year of the required experience must include providing direct technical assistance to taxpayers.

Substitute EDUCATION for EXPERIENCE:

NONE

Substitute EXPERIENCE for EDUCATION:

Experience in tax records examination, tax administration, tax investigation, tax auditing, property appraisal, accounting, business administration, collections or a related field will substitute for the required education on a year-for-year basis. Current or prior military experience will substitute for the required college on a year-for-year basis.

SPECIAL REQUIREMENTS (AGE, LICENSURE, REGULATION, ETC.):

NONE

EXAMPLES OF DUTIES OR RESPONSIBILITIES OF THE JOB CLASSIFICATION: *Examples of duties or responsibilities are not to be construed as describing what the duties or responsibilities of any position shall be and are not to be construed as limiting the appointing authority's ability to assign, or otherwise alter the duties and responsibilities of a position. This is not intended to be an exhaustive list.*

Provides direct, independent assistance and case resolution to taxpayers and other department employees by acting as a subject matter expert regarding tax type statutes and regulations. Provides recommendations to management regarding updates to tax returns and instructions. Independently performs complex office level examinations on a variety of state taxes for compliance with Kentucky tax laws and regulations. Maintains data for legislatively mandated program reports and submits the formatted data timely to required recipients after management review and approval. Reviews policies and makes recommendations to management regarding process improvements, etc. Develops training materials using a variety of media. Trains department employees. Completes in-depth tax research. Assists management lead research and analysis to facilitate decision making within the division or office. Confers directly with taxpayers who call, walk in, or write to the central office or taxpayer service center to answer any questions, complaints, or to explain adjustments or outstanding tax liabilities and/or delinquencies related to all tax laws administered by the Department of Revenue or the Department of Vehicle Regulation. Explains Department of Revenue or Department of Vehicle Regulation policies, procedures, regulations, tax returns, and notices of tax due. Addresses all situations and makes decisions on how to resolve the taxpayer's concerns as well as the Commonwealth's concerns about case resolution, and coordinates the resolution of the inquiries, questions, or complaints with all divisions within the department. Explains the laws, procedures, circulars, policies, and tax filing requirements to taxpayers. Assists taxpayers in computing and paying tax liabilities, preparing, paying, and filing timely and/or delinquent tax returns of multiple taxes administered by the department. Verifies taxpayer registration and completes all facets of taxpayer registration. Corrects or updates improper or missing taxpayer account information. Operates computer terminals to obtain taxpayer account information, outstanding tax bills, and other information. Researches all tax laws, regulations, and policies, to keep abreast of any changes. Assists beginning level specialist. Serves as project leader on special assignments or projects.

UNIQUE PHYSICAL REQUIREMENTS:

Any unique physical requirements necessary to perform the duties of a specific position will be listed on the individual position description, if applicable.

TYPICAL WORKING CONDITIONS: *Incumbents in the job will typically perform their job duties under these conditions.*

Incumbents working in this job title primarily perform duties in an office setting.

ADDITIONAL REQUIREMENTS:

Upon employment, employees in this job classification may be required to maintain a valid driver's license and may be required to drive a licensed vehicle. This status may be necessary for the length of time in this job classification. If this is necessary, it will be listed in the specific position description for the position at issue. Applicants and employees in this job classification may be required to submit to a drug- screening test and background check. Applicants and employees in positions which perform job duties that may require contact with offenders in the custody or supervision of the Department of Corrections or with youth in the care, custody, or supervision of the Department of Juvenile Justice must meet qualifications pursuant to the federal Prison Rape Elimination Act, 28 C.F.R.115.17 and 115.317.

The Commonwealth of Kentucky does not discriminate on the basis of race, color, sex, disability, age, national origin, religion, sexual orientation, gender identity or expression, pregnancy or related medical condition, marital or familial status, ancestry, political affiliation, genetic information, or veteran status in accordance with state and federal laws.