

ILLINOIS DEPARTMENT OF CENTRAL MANAGEMENT SERVICES
CLASS SPECIFICATION

REVENUE TAX SPECIALIST II

POSITION CODE: 38572

Effective: 9-1-23

DISTINGUISHING FEATURES OF WORK:

Under general direction, performs technical analysis of nonroutine and highly technical tax returns, allied documents, all types of claims, refund or hardship refunds, manual and automated records, accounts referred through an integrated tax system which have been determined to fall within normal in-house collection criteria, property tax abstracts, property tax and sales tax exemption applications and other material for propriety, accuracy, pertinence and significance of information, and/or for determination of referral to other areas; independently determines research methods necessary for resolution of discrepancies, deficiencies or referral for on-sight collection action; reviews, evaluates and perfects mathematical, technical, legal and procedural errors; independently determines and takes manual and automated correction/adjustment or billing action; recommends approval or denial of claims for credit, refund, hardship and property tax and sales exemption status; calculates tentative and final multipliers for counties; calculates apportionment of tax burden in overlapping taxing districts; confers with taxpayers and/or their representatives for the purpose of providing assistance in completing tax forms, working out compliance agreements, and for resolving tax delinquencies; communicates with county officials and the public on property tax issues; conducts training for local assessors; assists in training lower level staff; establishes payment plans; performs in-house collection functions; maintains automated calling systems.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Reviews, analyzes and evaluates nonroutine and highly technical original, amended, electronically transferred or alternative media tax returns and allied documents, small and large claim or refund requests, computer generated notices, correspondence, audit reports, manual and automated account records, priority account claims, taxpayer registration forms, legislative referrals, disputed billings, reasonable cause, uncollectable accounts determined to qualify for normal in-house collection criteria, applications and other documents for compliance with tax laws, rules and regulations, and mathematical, technical and procedural accuracy.
2. Independently determines research methods necessary for resolution of discrepancies or deficiencies; researches Illinois Administrative Code, Commerce Clearing House Tax Guides, Sunshine Act, Illinois Commerce Commission data, various state and federal statutes, agency rules and regulations, prior and current year account files, records and tax returns, computer files and other regulatory material.
3. Makes factual and technical determinations and initiates manual and automated corrective/adjustment/edit and billing actions to resolve discrepancies/deficiencies, to make computer acceptable, and/or determines the appropriate in-house collection action necessary to resolve the account.

REVENUE TAX SPECIALIST II (Continued)

4. Recommends approval and denial of claims for credit, refund, and hardship or property tax and sales tax exemption status.
5. Performs all levels of manual and/or automated mathematical calculations and procedures in computing tax liability and applicable penalty and interest, disallowed discounts or deductions, canceling all or portions of assessments, allocation of monies in accordance with state statutes, etc; calculates final and tentative multipliers that are assigned by the State to all counties; calculates apportionment of tax burden in overlapping taxing districts, etc.
6. Corresponds and/or confers with taxpayers and their representatives advising them of status of accounts, to obtain further clarifying information, or to explain interpretation of tax laws, rules, regulations and agency policies; sets up payment plans for the taxpayer for collection of delinquent taxes.
7. Provides technical taxpayer assistance to taxpayers, their representatives, the general public and others by telephone, correspondence or personal contact, involving independent interpretation and explanation of tax laws administered by the agency; researches computerized tax records and tax documents; verifies tax liability, penalty and interest and explains how tax liability, penalty and interest were determined in accordance with applicable tax laws, rules, regulations and policies; explains taxable income and liabilities for penalties; prepares documentation to change tax liability, penalty and interest; responds verbally or in writing to taxpayers in the completion of all types of current, delinquent or amended returns, including all supporting attachments such as forms, statements, schedules, and transcripts of accounts necessary to assist the taxpayers. Communicates with county officials and the public on property tax issues and practices; makes speeches and presentations on property tax issues; administers Supervisor of Assessment exams and Board of Review exams. Participates, with higher level staff, in VITA and Tax Counseling for the Elderly training for volunteer groups.
8. Independently performs taxpayer information duties in conjunction with automated telephone collection demands for payment of tax deficiencies, the filing of delinquent tax returns, or the department's request for additional information related to all types of taxes.
9. Participates in on-the-job training of new employees and lower level clerical staff in applicable work methods and procedures.
10. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or new automated systems; assists in writing processing methods and procedures. Gathers data, compiles charts or tables used in appraisal manuals and gathers market data, real estate related functions such as valuation for taxation and assists as part of a project team in researching data relating to property tax extensions or school funding issues.

REVENUE TAX SPECIALIST II (Continued)

11. Prepares annual assessment sales ratio study; collects and analyzes data for random sample comparison of assessed values; assures proper procedures are followed by each county and that assessment policy changes are implemented; determines county assessment level and adjusts to proper level when necessary.
12. Participates in quality review of completed work of same or lower level staff within assigned work areas; serves as a member of a quality review team in searching for and identifying better working approaches.
13. Compiles and prepares production, statistical and informational reports.
14. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.

DESIRABLE REQUIREMENTS:

Education and Experience

Requires three years of experience as a Revenue Tax Specialist I with the Illinois Department of Revenue.

A Revenue Tax Specialist I requires successful completion of the Revenue Tax Specialist Trainee program, which entails 12 months of agency training, and either:

- a) Knowledge, skill and mental development equivalent to the completion of four years of college;
OR
- b) Four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.

Knowledges, Skills and Abilities

Requires working knowledge of current Illinois and federal tax laws, rules and regulations and out-of-state filing requirements.

Requires working knowledge of tax terminology, forms and documents utilized in the processing of tax returns and supporting documentation.

Requires working knowledge of methods and procedures used in compiling and recording statistical information.

Requires working knowledge of manual and automated files, procedural manuals and other related materials utilized in the research and analysis of tax returns and supporting documentation for compliance with applicable tax regulations.

Requires working knowledge of tax accounting theory, collection procedures, principles and practices.

Requires working knowledge of computer systems as related to the processing of various tax information.

REVENUE TAX SPECIALIST II (Continued)

Requires working knowledge of manual and automated office equipment.

Requires working knowledge of public relations principles and practices.

Requires working knowledge of all aspects of property tax assessment administration.

Requires working knowledge of all aspects of property tax and sales tax exemption application processes and procedures.

Requires ability to independently take corrective action within broad general guidelines in cases involving delinquencies, deficiencies and other irregularities.

Requires ability to gain and maintain satisfactory working relationships with the public and other employees.

Requires ability to compose correspondence to taxpayers, their representatives and others.

Requires ability to prepare and maintain complex statistical and informational reports.

Requires ability to detect computational, legal and technical errors in the manual or automated process of analyzing tax returns and supporting documents.

In addition to having a written and spoken knowledge of the English language, candidates may be required to speak and write a foreign language at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.