

POSITION SUMMARY

This is an entry level position that is responsible for performing technical customer service activities including providing in-person assistance to customers, processing payments, balancing cash registers and educating taxpayers. This position assists English and Spanish speaking customers. This position is primarily responsible for answering difficult questions about individual income tax, sales tax, employer withholding, related tax credits, and working with customers who owe back taxes or statewide debt. The position will be cross trained in a variety of tax areas for customer assistance and use of tax systems. In addition to providing in-person customer support, this position will also perform administrative program support duties. The work involves extensive in person and some phone contact (inbound and outbound) which requires independent judgement and decision-making ability with a broad knowledge of all tax compliance. The work is performed under close supervision.

<u>TIME %</u>	<u>GOALS AND WORKER ACTIVITIES</u>
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| 70% | A. Performance of Technical Customer Service Activities in English and in Spanish. |
| 30% | A1. Respond to inquiries in person, by telephone, letter, and email regarding difficult technical issues related to individual income tax, withholding tax, sales and use taxes, collection accounts, and other programs administered by the department. |
| 10% | A2. Assist customers in preparing and electronically filing Homestead Credit claims. |
| | A3. Research complex technical issues in order to respond to customer inquiries. |
| | A4. Assist customers in using department applications and notify supervisor about issues that appear to relate to system or process problems. |
| 10% | A5. Accept cash from customers, accurately make change, balance register, order change as needed, prepare cash deposits and make bank deposits. |
| | A6. Create payment vouchers and provide receipt of payments. |
| | A7. Provide copies of tax returns and related documents for customers under statutory guidelines. |
| | A8. Accept documents from customers and route for review and/or processing. |
| 20% | B. Assistance to Other Divisions, Bureaus, and Units. |
| | B1. Review accounts and resolve a variety of problems related to payments, address updates, return processing, delinquent collections, assessments and refunds. |
| | B2. Process lottery prize claims. |
| | B3. Complete work list items in WINPAS. |
| | B4. File Unclaimed Property claims electronically, accept required documents and clarify letters mailed to claimants. |
| | B5. Other IS&E Division projects as assigned including refund review and returned mail work. |
| | B6. Assist with translating Spanish for other areas |
| 10% | C. Performance of Other Duties. |
| | C1. Participate in regular training to learn about taxes, develop customer service skills and obtain proficiency in answering tax questions. |
| | C2. Keep informed on technical information memorandums, administrative directives, and statutory changes. |
| | C3. Attend and participate in unit, section, bureau and departmental meetings, teleconferences, and training sessions. |
| | C4. Perform administrative duties such as postage, purchasing or mail. |
| | C5. Participate on teams to improve processes and procedures. |

C6. Other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES

1. Knowledge of federal and state individual income tax law and/or withholding tax law, and general sales and use tax law.
2. Knowledge of Wisconsin legal precedents, IRC regulations, federal revenue rules and procedures, federal publications, Wisconsin statutes, Wisconsin administrative code, Wisconsin publications, and department policies.
3. Knowledge of Wisconsin and federal tax forms.
4. Customer service skills – polite, courteous, and professional.
5. Cash handling skills.
6. Effective verbal and written communication skills.
7. General knowledge of all programs administered by the Department of Revenue.
8. Knowledge of effective research techniques.
9. Knowledge of current training concepts and techniques.
10. Organizational and prioritization skills.
11. Skill in using Microsoft Office Suite Products (e.g., Excel, Word, Outlook) or equivalent.

SPECIAL REQUIREMENT:

Ability to speak fluently in English and Spanish