



TAX SERVICE SPECIALIST

SCOPE OF WORK:

Work involves reviewing and editing tax forms and returns, communicating discrepancies, and responding to questions related to North Dakota tax law.

DUTIES PERFORMED AT ALL LEVELS:

- Review forms, reports, and attached schedules and request additional information from customers when needed.
- Notify customers of changes through work papers, schedules, or letters.
- Provide assistance to customers via email, letters, telephone, and in person, including receiving and responding to complaints.
- Calculate refund, tax, penalty or interest due; receive and issue payments; maintain a record of payments provided; prepare notices of deficiency and refund.
- Maintain current knowledge of forms, policies, procedures, guidelines and North Dakota tax law.
- Assist in training new employees and temporary hires.
- Review, code, correct, enter, and verify information in the database, and file submitted exemptions.
- Participate in discovery and compliance projects.
- Suggest and test changes to the integrated tax system.
- Prepare documents for signature and recording.
- Issue or approve refunds in accordance with predetermined thresholds.
- Issue or recommend waivers of penalty and/or interest.

NOTE: The duties listed are not intended to be all-inclusive. Duties assigned any individual employee are at the discretion of the appointing authority.

TAX SERVICE SPECIALIST I
GRADE G

0237

LEVEL DEFINITION:

Work at this level requires a basic understanding and application of North Dakota tax law. Work involves communication with taxpayers regarding issues that are well-defined and involve standard responses that are generally specifically outlined in tax law and guidelines. Standard procedures are generally clearly defined.

ADDITIONAL DUTIES PERFORMED AT THIS LEVEL:

- None

MINIMUM QUALIFICATIONS:

Requires an associate degree with major coursework in accounting or business and two years of directly related accounting, bookkeeping, or auditing work experience. Qualifying work experience would normally include receiving and analyzing information, determining available solution(s) and assisting or directing customers in implementing and completing necessary steps to resolve issues or satisfy inquiries. Additional work experience as described may substitute for the education requirement on a year-for-year basis.

TAX SERVICE SPECIALIST II
GRADE I

0238

LEVEL DEFINITION:

Work at this level is differentiated from the first level by requiring broader or deeper specialized understanding of North Dakota tax law. Work involves communication with taxpayers regarding issues that due to the more complex nature require in-depth research. Employees at this level are often considered to be an expert in certain work processes and may perform lead worker functions.

ADDITIONAL DUTIES PERFORMED AT THIS LEVEL:

- Assist taxpayers with questions of an increased technical and complex nature.
- Draft correspondence to taxpayers where established wording is not available.
- Provide technical assistance to staff in other sections relating to work product.
- Provide significant input into processes related to one or more major work duties and the integrated tax system.
- Analyze complex, non-routine tax situations and communicate findings.
- Monitor work processes within the integrated tax system to ensure change requests are not suspending unnecessarily.
- Review, approve, and process submissions without proper documentation or special tax scenarios
- Review and update the agency messages and form letters.
- Prepare reports for posting to the department website.
- Receive, assign, and process communications and requirements from the IRS.
- Examine, research, and process potentially fraudulent tax returns.
- Manage and maintain special tax system processes based on specific tax law.

MINIMUM QUALIFICATIONS:

Requires an associate degree with major coursework in accounting or business and four years of directly related accounting, bookkeeping, or auditing work experience. Qualifying work experience would normally include receiving and analyzing information, determining available solution(s) and assisting or directing customers in implementing and completing necessary steps to resolve issues or satisfy inquiries. Additional work experience as described may substitute for the education requirement on a year-for-year basis.

Eff. Date: 8/14