

STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION

REVENUE TAX ASSISTANT  
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under Wis. Admin. Code ER 2.04 for making classification decisions relative to present and future Revenue Tax Assistant (RTA) positions located within the classified service. Positions allocated to these classifications are located in the Department of Revenue, Division of Income, Sales & Excise Tax and the Division of Administrative Services, Information Systems Bureau and perform a variety of general tax assistance work. As the Integrated Tax program is developed and implemented, positions within this series will continue to acquire and demand more tax knowledge, increasing job expectations. In addition, the Integrated Tax program will demand positions gain additional and/or different duties, increase cross-training and retraining of activities within and between Bureaus, and automate many tax processing systems. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area and future review and possible revisions of these classification specifications will required.

Classification decisions must be based on the "best fit" of the duties within the existing classification structure. The "best fit" is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification series encompasses tax support positions located within the Division of Income, Sales & Excise Tax and the Division of Administrative Services, Information Systems Bureau. Positions allocated to this classification series are responsible for a variety of general clerical support duties which require tax knowledge in at least one tax area: Sales tax (including specialized sales tax types, such as Local Exposition, Premier Resort, Rental Vehicle, etc.), Withholding tax, Income tax, Excise tax, or Corporate/Franchise tax.

C. Exclusions

Excluded from this classification series are the following types of positions:

1. Positions outside of the Division of Income, Sales and Excise Tax or the Division of Administrative Services, Information Systems Bureau.
2. Positions which do not require tax knowledge.
3. Professional positions which, for a majority of the time, perform duties which are more appropriately classified as Revenue Tax Specialist, Revenue Agent, Tax Representative Assistant, Revenue Auditor or Revenue Field Auditor.
4. Positions which, for a majority of the time, perform duties which are more appropriately classified as Clerical Assistant, Program Assistant, or Word Processing Operator.
5. Supervisor, confidential, or management positions as identified in 111.81, Stats.
6. Positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression through This Classification Series

Employees typically enter positions within this classification series by competitive examination. Competitive examination may include transfer or demotion for employees seeking to make a career change into the Revenue Tax Assistant occupational area. Progression to the Objective Level may occur through reclassification as the employee satisfactorily attains the necessary training, education or experience.

## II. DEFINITIONS

### REVENUE TAX ASSISTANT CLASSIFICATION SERIES

The essential functions of the jobs in this series include: typing, keying, retrieving, and adjusting tax information, data and correspondence; filing and retrieving files; receiving, processing and distributing correspondence, reports and returns; scanning or microfilming; providing general tax information, materials and requests to taxpayers and other individuals outside the Department.

### REVENUE TAX ASSISTANT – ENTRY

Positions allocated to Revenue Tax Assistant – Entry perform in a learning capacity and work closely with more experienced RTAs, Revenue Tax Representatives and/or supervisors to acquire knowledge, understanding, and experience in fundamental tax procedures, policies and rules. The work performed is similar to the work described at the RTA Objective level, but involves lesser scope, complexity, discretion and decision making than is found at the RTA Objective level. Work is performed under close progressing to limited supervision.

### REVENUE TAX ASSISTANT - OBJECTIVE

Positions at the RTA Objective level perform, for a majority of the time and under general supervision, any combination of the duties described in the classification series definition statement above, in the following

areas of the Division of Income, Sales and Excise Tax:

**Audit Bureau:** *Central Audit, Office Audit Unit E, Field Audit, District Units, Office Services Section, Clerical Unit.*

**Compliance Bureau:** *Business Tax Services Section, Return Review and Processing Unit, Vehicle Review Unit; Central Collection Section, Unit A, Unit B, Special Procedures Unit, Delinquent Processing Unit, Skip Tracing Unit; Field Compliance Section, Eau Claire District, Madison District.*

**Processing Bureau:** *Administrative Support Unit, Validation Unit, Billing and Check Clearance Unit, Individual Income Tax Exceptions Sub-Unit, Day Shift Income Tax Processing Sub-Unit, File Retrieval and File Services Units, Mail Opening Units, Scanning Units and Office Services.*

**Office of Appeals:** *Clerical Unit*

**Information Systems Bureau:** *Data Control Unit*

### III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

### IV. ADMINISTRATIVE INFORMATION

This classification series was created July 5, 1998 (see Bulletin CC/SC-90). This is Phase 1 of the Department of Revenue clerical study which resulted in the reallocation of positions formerly classified as Clerical Assistant and Program Assistant. As the Integrated Tax program is developed and implemented, positions within this series will continue to acquire and demand more tax knowledge, increasing job expectations. In addition, the Integrated Tax program will demand positions gain additional and/or different duties, increase cross-training and retraining of activities within and between Bureaus, and automate many tax processing systems. To address these future Department of Revenue transformations and employe opportunities, Phase 2 of the clerical study will require the review and revision of these classification specifications as necessary to classify positions appropriately based upon circumstances which exist at that time.