

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

REVENUE TAX REPRESENTATIVE
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 Representative positions. Positions allocated to this classification series are located within the Department of Revenue, Division of Income, Sales & Excise Tax and the Division of Administrative Services, Information Systems Bureau and perform a variety of high-level and complex clerical tax assistance work. As the Integrated Tax program is developed and implemented, positions within this classification 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 is not intended to identify every duty which may be assigned to positions, but is intended to serve as a framework for classification decision making in this occupational area.

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 advanced tax support positions located within the Department of Revenue, Division of Income, Sales & Excise Tax and the Division of Administrative Services, Bureau of Information systems. Positions allocated to this classification series are responsible for a variety of duties that require significant 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; and Corporate/Franchise tax. In addition, Revenue Tax Representative positions require independent tax procedure research, personal contacts with those outside the Department regarding tax-related subjects, and work that directly effects a large number of taxpayers. Revenue Tax Representative positions often perform leadworker activities over Revenue Tax Assistants, although it is not a requirement for a position to be included in this classification series.

C. Exclusions

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

1. Positions which meet the statutory definitions of supervisor, management, or confidential as defined in Wis. Stats. 111.81(19), (13) and (7) as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions which are located outside of the Department of Revenue, or outside of the Department of Revenue's Division of Income, Sales & Excise Tax or the Division of Administrative Services, Information Systems Bureau.
3. Positions which do not require tax knowledge.
4. Positions which, for a majority of the time, perform duties which are more appropriately classified as Revenue Tax Specialist, Revenue Agent, Tax Representative, Revenue Auditor, or Revenue Field Auditor.
5. Positions which, for a majority of the time, perform duties which are more appropriately classified as Clerical Assistant, Program Assistant, or Word Processing Operator.
6. All other positions which are more appropriately identified by other classification specifications.

D. Entrance and Progression Through This Classification Series

Employees typically enter positions within this classification series by competitive examination. Competitive examination may include transfer or demotions for employees seeking to make a career change into the Revenue Tax Representative 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 REPRESENTATIVE CLASSIFICATION SERIES

The essential functions of the positions in this classification series include: researching tax-related problems and/or issues; contacting taxpayers, legislators and other individuals outside the department to gather information; and leading the work of Revenue Tax Assistant and/or Revenue Tax Representative positions, although it is not necessary for a position to function as a leadworker in order to be classified in this series.

REVENUE TAX REPRESENTATIVE – ENTRY

Positions allocated to the entry level perform in a learning capacity and work closely with more experienced Revenue Tax Representatives, Tax Representatives, and/or supervisors to acquire knowledge, understanding, and experience in fundamental tax processes. The work performed is similar

to the work described in the Revenue Tax Representative – Objective level, but involves scope, complexity, discretion and decision-making that is less than is found at the Revenue Tax Representative – Objective level. Work is performed under close progressing to limited supervision.

REVENUE TAX REPRESENTATIVE - OBJECTIVE

Positions allocated to Revenue Tax Representative – Objective level perform, under general supervision, any combination of the activities described below, in one or more of the areas identified, for a majority of the time. In addition, positions may function as senior leadworker, although it is not necessary for a position to function as leadworker in order to be classified at this level.

Audit Bureau:

Central Audit, Office Audit Unit K – Provide support to the refund review process and to the voluntary compliance and audit projects.

Excise Office Audit – Audit fuel tax refund claims.

Field Audit Administrative Support Unit – Under the guidance of a function director, prepare statistical tax reports; compute and record interest and dollars; prepare worksheets; and maintain payment collection records.

Office Services Section, Clerical Units – Perform duties identified in the Revenue Tax Representative definition and function as the leadworker over all Revenue Tax Assistants in the sub-unit.

Compliance Bureau:

Business Tax Services Section: Inquiry and Technical Assistance Unit, Registration Unit, or Return Review and Processing Unit – Coordinate the entire sales/use tax estimate programs; review and determine the proper processing of sales/use and local exposition tax returns received as “exception” or “miscellaneous” returns; review applications for new business tax registrations or changes to existing registrations; or review and determine the proper processing of dry cleaning solvent fee returns, rental vehicle returns, and premier resort returns.

Central Collection Section, Central Collection Unit A – Research delinquent tax information; review agent lists; and prepare monthly reports.

Special Procedures Unit – Provide support to the Revocation and Nonrenewal programs; review bankruptcy notices, correspondence, and payments; and monitor bankruptcy claim cases.

Field Compliance Section, Milwaukee Districts G and I – Support post-revocation and tavern programs; monitor compromise program; process tax warrant releases; and compile statistical reports.

Delinquent Processing Unit – Post payments and administrative adjustment transactions to the delinquent tax computer system; reconcile and balance daily cash deposit; correct posting errors; and initiate transfers and refund of overpayments.

Processing Bureau:

Validation Unit – Perform duties identified in the Revenue Tax Representative definition and function as leadworker over day or night shift Revenue Tax Assistants.

Corporate Processing Unit – Resolve routine and/or difficult appeals and questions of corporation franchise and income tax adjustments; review on-line routine and/or moderately difficult system generated tax due and refund notices; and perform on-line correction of routine and/or moderately difficult accounts.

Adjustment-Review Unit, Refund Research Unit, Estimated Tax Unit – Process computer-initiated adjustment notices; resolve processing exceptions; prepare and review text data for computer adjustment systems; assure accuracy of estimated tax accounts; and process estimated tax payments and documents.

Billing and Check Clearance – Perform duties identified in the Revenue Tax Representative definition and function as leadworker to Revenue Tax Assistants.

Individual Income Tax Exceptions Sub-Unit – Perform duties identified in the Revenue Tax Representative definition and function as leadworker over Revenue Tax Assistants.

Day Shift Income Tax Processing Sub-Unit – Perform duties identified in the Revenue Tax Representative definition and function as leadworker over permanent Revenue Tax Assistants.

Night Shift Income Tax Processing Unit – Perform duties identified in the Revenue Tax Representative definition and function as leadworker to 80-90 LTE's.

Scanning – Perform research duties identified in the Revenue Tax Representative definition and function as leadworker over Revenue Tax Assistants.

Shipping and Mailing Section – Coordinates forms request program; research and respond to customer questions on the internet; and coordinate Fax-A-Form Document Retrieval System.

Cashier and Account Reconciliation Unit – Perform the more complex EFT registration, payment processing, and reversals plus provide taxpayer assistance regarding the EFT program.

Information Systems Bureau:

Data Control Unit – Operate key-to-disk control unit; develop error detection and correction related to coding, screening and taxpayer errors; and function as leadworker over Revenue Tax Assistants.

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 effective July 5, 1998 and announced in Bulletin CC/SC-90 as part of Phase One of the Revenue Clerical Survey. Phase One resulted in the reallocation of a number of

positions classified as Program Assistant to the Revenue Tax Representative classification series. This classification series was modified effective February 14, 1999 and announced in Bulletin CLR/SC-96 as part of Phase Two of the Revenue Clerical Survey. Modifications were made to more accurately reflect the duties assigned to positions in this specification as a result of changes from the Integrated Tax Program. As the Integrated Tax program is developed and implemented, positions within this classification 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 Revenue Clerical Study will require the review and modification of these classification specifications as necessary to classify positions appropriately based upon circumstances which exist at that time.

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