

STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION

UNEMPLOYMENT TAX AND ACCOUNTING SPECIALIST  
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future Unemployment Insurance (UI) employer account services positions located within the Department of Workforce Development. Positions allocated to this series provide total employer account services within self-directed work teams specific to Unemployment Insurance (UI) tax purposes. This classification specification is not intended to identify every duty which may be assigned to positions, but it 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: definitions 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 inclusions and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This series encompasses professional positions, as defined in s. 111.81(15), Wis. Stats, that are located within the Bureau of Tax and Accounting of the Division of Unemployment Insurance. Positions allocated to this series provide total employer account management services within self-directed work teams specific to UI tax purposes. Positions in this series are responsible for recommending law, system, and procedural changes; conducting investigations; rendering decisions and determinations regarding employer tax liability; issuing appealable determinations regarding employer coverage and business transfers, tax rate adjustments, and audit findings; reviewing, resolving and coordinating appealed determinations; processing completed audits and transactions resulting from audit findings; participating in the development, testing and maintenance of the State Unemployment Insurance Tax Enterprise System (SUITES) calculating the effects of adjustment and audit transactions on employer tax rates; maintaining individual employer master file and financial accounts; handling and managing all aspects of a variety of technical cases; providing technical assistance to nonprofit government and other specialty employers; and researching issues and providing technical assistance for appeal hearings.

C. Exclusions

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

1. Positions which do not spend the majority of their time providing total employer account management services specific to UI tax purposes including managing all aspects of technical cases, conducting investigations and reviews of employer UI tax accounts, maintaining individual employer UI tax accounts, rendering decisions and determinations and issuing appealable determinations regarding employer UI coverage, liability and business transfers, and reviewing, resolving and coordinating appealed determinations.
2. Positions which collect unemployment benefit overpayments or delinquent employer liability unemployment contributions the majority of the time. These positions are more appropriately classified as Unemployment Insurance Collections Specialist.
3. Positions which meet the statutory definition of supervisor or management as defined in s. 111.81(19) and (13), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
4. Positions which do not meet the statutory definition of professional employee as defined in s. 111.81(15), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
5. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression Through This Classification Series

Employees typically enter this classification series at the Unemployment Tax & Accounting Specialist level, by competition. Progression to the intermediate and senior levels will occur through reclassification after the employee satisfactorily attains the specified training, education, or experience. The advanced level will be filled by competition.

## II. DEFINITIONS

### **UNEMPLOYMENT TAX & ACCOUNTING SPECIALIST**

Positions at this level work under **CLOSE** supervision. The focus is on learning the procedures, techniques, rules, laws and financial principles and practices necessary to manage and maintain employer UI tax accounts. The work assignments are limited in nature and scope. The work products are closely reviewed for technical and programmatic accuracy, and for compliance with UI laws and the agency's and/or division's policies and standards.

### **UNEMPLOYMENT TAX & ACCOUNTING SPECIALIST - INTERMEDIATE**

Positions at this level work under **LIMITED** supervision. Positions at this level require the incumbent to continue to develop knowledge and skill in the program area and associated procedures, practices, techniques, rules, laws and financial principles and practices necessary to manage and maintain employer UI tax accounts. The work assignments are more varied in nature than at the entry level. The work products receive limited review for technical and programmatic accuracy and for compliance with UI laws and the agency's and/or division's policies and standards.

**UNEMPLOYMENT TAX & ACCOUNTING SPECIALIST - SENIOR**

Positions at this level work under **GENERAL** supervision. This is the full performance level and it is the level that an employee in this series can reasonably expect to attain. Positions at this level require a broad knowledge of the concepts, procedures, practices, techniques, rules, laws and financial principles and practices necessary to manage and maintain employer UI tax accounts. Positions at this level are assigned the full scope of activities necessary to service an employer UI account from start to finish. The work assignments are complex and varied in nature and scope. The work products receive general review for technical and programmatic accuracy and for compliance with UI laws and the agency's and/or division's policies and standards.

**UNEMPLOYMENT TAX & ACCOUNTING SPECIALIST - ADVANCED**

Positions at this level perform the most complex work and may lead or review the work of other staff in the unit. Positions at this level work under **GENERAL** supervision. Positions at this level are responsible for analyzing and making recommendations for new or revised policy, legislation and/or administrative code; assessing the need for review of and/or revision to policies, rules, laws, and/or operating procedures and participating in the creation of procedures that ensure compliance with legal parameters; preparing drafts of law, rules, regulations, and/or policies; determining fiscal impacts of proposed legislative changes; evaluating and developing team methods and procedures, team performance, and quality control standards; and developing and implementing employer outreach and education programs. Positions at this level may handle sensitive and controversial cases and provide technical direction and guidance to lower level staff in resolving difficult and/or unique cases.

**Representative positions:**

UI Employer Account Services Leadworker: Positions are responsible for leading staff at the Unemployment Tax and Accounting Specialist Senior and lower. As Leadworker, the responsibilities include determining job priorities, assigning and coordinating work of lower level staff, monitoring work performance and written documents for completeness and accuracy and ensuring accuracy of the work performed by Unemployment Tax & Accounting Specialist, Intermediate and Senior staff.

UI Employer Account Services Staff Development Coordinator: Positions are responsible for reviewing, developing, and coordinating staff development materials and manuals. Responsibilities include designing, developing, and conducting group and individual UI training for employer account services staff; evaluating, maintaining and updating training materials and user manuals; and providing on-going tutoring for staff to increase understanding of the UI program employer services.

UI Employer Account Services Investigator: Positions are responsible for the most complex decisions, make determinations or redeterminations. This employee is responsible for handling the most sophisticated transactions, and dealing with the most complex issues. Conduct case reviews. Position is also responsible for developing and testing tax system (SUITES) programming changes or modification.

**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. ADMINISTRATION INFORMATION**

This classification was created effective May 11, 1997, as a result of the re-engineering of the Bureau of Tax & Accounting in the Division of Unemployment Compensation and announced in Bulletin CC/SC-66. The positions in this class were formerly classified as Unemployment Contribution Specialists.

This classification series was modified effective November 2, 2014 in bulletin OSER-0382-MRS/SC to retitle the entry level, to add representative positions to the Advanced level and to update the progression language. These updates were done in conjunction with the implementation of the broadbanding of this classification series.

CAJ/WFK  
KCH/PCF  
48075