

CLASSIFICATION: TAX FORMS EXAMINER

Class Code: 9272-12

Date Established: 10-08-65

Occupational Code: 1-3-2

Date of Last Revision: 09-02-15

Exempt Status: Non-Exempt

BASIC PURPOSE: To audit all tax returns or other tax forms filed to determine accuracy, completeness and timeliness and to ensure compliance with New Hampshire laws and tax statutes.

CHARACTERISTIC DUTIES AND RESPONSIBILITIES:

- Audits tax returns or other tax forms and related reports to check filing requirements, timeliness, completeness and accuracy.
- Reviews taxpayer and/or employer records for discrepancies identified by computer-generated reports.
- Prepares tax notices and correspondence relative to delinquent taxes, including calculating interest and penalty charges.
- Assesses interest and penalties for delinquent or incorrect tax computations and prepares refunds in the case of overpayment.
- Ensures that tax-related information is correctly received and entered, produces tax-related reports, and verifies accuracy.
- Assists taxpayers and/or employers, accountants, payroll companies, and related parties in providing information concerning correct filing procedures.

DISTINGUISHING FACTORS:

Skill: Requires skill in applying instructions to accomplish different job functions OR in operating machines for a variety of different purposes.

Knowledge: Requires knowledge of business practices and procedures or technical training in a craft or trade, including working from detailed instructions, to apply knowledge in a variety of practical situations.

Impact: Requires responsibility for contributing to immediate, ongoing agency objectives by facilitating the direct provision of services to the public or other state agencies. Errors at this level result in inaccurate reports or invalid test results and require significant investment of time and resources to detect.

Supervision: Requires partial supervision of other employees doing work which is related or similar to the supervisor, including assigning job duties, providing training, giving instructions and checking work.

Working Conditions: Requires performing regular job functions under good conditions in a safe working environment.

Physical Demands: Requires sedentary work, including continuous sitting or occasional standing and walking.

Communication: Requires explaining facts, interpreting situations, or advising individuals of alternative or appropriate courses of action. This level also requires interviewing or eliciting information from state employees or members of the general public.

Complexity: Requires a combination of job functions to establish facts, to draw daily operational conclusions, or to solve practical problems. This level also requires providing a variety of alternative solutions where only limited standardization exists.

Independent Action: Requires a range of choice in applying a number of technical or administrative policies under general direction and in making routine decisions or in recommending modifications in work procedures for approval by supervisor.

MINIMUM QUALIFICATIONS:

Education: Associate's degree from a recognized college or technical institute with major study in accounting, business, economics, finance, computer information systems or a related field. Each additional year of approved formal education may be substituted for one year of required work experience.

Experience: Two years' experience in accounting or auditing. Each additional year of approved work experience may be substituted for one year of required formal education.

License/Certification: None required.

SPECIAL REQUIREMENTS: For appointment consideration, Tax Forms Examiner applicants must successfully participate in a written examination measuring possession of knowledge, skills and abilities identified as necessary for satisfactory job performance by this class specification.

RECOMMENDED WORK TRAITS: Knowledge of accounting principles and methods. Ability to establish and maintain necessary records of tax returns and other tax forms. Ability to perform accurate mathematical computations. Ability to convince others using factual data and information. Ability to use judgment and tact in dealing with taxpayers, employers, accounting/payroll representatives, and fellow workers. Ability to establish and maintain effective working relationships with taxpayers, employers, accounting/payroll representatives and fellow employees. Must be willing to maintain appearance appropriate to assigned duties and responsibilities as determined by the agency appointing authority.

DISCLAIMER STATEMENT: This class specification is descriptive of general duties and is not intended to list every specific function of this class title.