

New York State Department of Civil Service
DIVISION OF CLASSIFICATION & COMPENSATION

Classification Standard

Occ. Code 0612100

Tax Information Aide, NS

Brief Description of Class Series

Tax Information Aides respond to verbal, written, and electronic inquiries from taxpayers and their representatives regarding New York State and/or New York City taxes, or provide information and assistance to the public relating to State sponsored programs.

Positions are classified only in the Department of Taxation and Finance.

Distinguishing Characteristics

Tax Information Aide: seasonal, hourly employees; respond to verbal, written and/or electronic inquiries from taxpayers and their representatives or from the public for the purpose of providing general information and assistance on tax related matters. When assigned to a Call Center, incumbents wear a headset and answer telephone calls that are automatically and continuously distributed by the telephone system. May perform more difficult office support work, and tasks related to paper and electronic processing of taxpayer returns and correspondence.

Related Classes

Taxpayer Services Representatives 1 answer more technical taxpayer inquiries; assist taxpayers in preparing tax forms, returns, registrations and licenses; and explain provisions and requirements of the tax law.

Illustrative Tasks

Duties may include some or all of the following tasks:

Elicits information from callers to determine the nature of the inquiry.

Answers routine, simple questions related to the filing of New York State tax returns and filing requirements for other programs administered by the Department. Makes updates

to taxpayer accounts and sends appropriate correspondence as guided by procedures after reviewing tax returns, registration applications, tax forms, and account information.

Responds in writing, in person, or by telephone to inquiries from taxpayers, internal or external customers, or Department staff from other Divisions on a variety of topics such as filing requirements for current, amended, or delinquent tax returns, tax refunds and refund procedures, and the procedures and requirements for requesting extension of filing dates for tax returns.

Researches responses by referring to tax law, regulations, and other related material such as publications, tax forms and schedules, and various Department data files. Refers more complex inquiries to higher level staff members.

Assists taxpayers in initiating requests for adjustment to their tax returns.

Enters data into, and retrieves data from, the Department's automated tax files and databases.

May provide office support such as receiving, date-stamping, scanning, validating, and routing incoming mail, collating informational packets registration documents, and permits for mailings, and providing assistance to individuals needing access to applications.

- Establishes new files by numbering forms, coding, preparing file folders, and compiling relevant material. Updates and corrects records and files.
- Creates routine reports such as reports for personal and unit production, or assists in preparing reports by gathering data, tabulating results, and preparing simple charts.

Performs other related duties as required such as providing assistance to callers or responding to inquiries in the Consolidated Call Center; answers routine questions related to other New York State Agencies.

Independence of Operation

Tax Information Aides work within clearly defined guidelines. Incumbents are typically supervised by either a Taxpayer Services Representative 2 or Department staff in any position allocated to Grade 9 or above.

Complexity

Tax Information Aides provide assistance on more routine tax related matters. Incumbents must be familiar with the basic provisions of the tax laws, rules, and regulations, and have knowledge of Departmental procedures governing filing, payment

and processing of returns and registrations. Additionally, they must be familiar with other State sponsored programs when assigned to the Consolidated Call Center. Tax Information Aides who handle calls for other State agencies must be familiar with programs related to those agencies and be able to answer routine questions.

Communication

Tax Information Aides have telephone, face-to-face and written contact with the general public. Incumbents must be tactful, polite, helpful and able to communicate with a wide cross-section of people on routine tax related matters, or provide formatted general information. Incumbents must be able to provide information in a calm, courteous and reasonable manner even under very difficult, highly stressful and, at times, confrontational circumstances.

Minimum Qualifications

Tax Information Aide

Open competitive: none.

Note: Classification Standards illustrate the nature, extent, and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all the work that might be appropriately performed by a class. The minimum qualifications above are those required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum requirements for appointment or examination.

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