

New York State Department of Civil Service

DIVISION OF CLASSIFICATION & COMPENSATION

Occ. Code 0641200

Taxpayer Services Representative 2, Grade 14

Brief Description of Class

Employees in this class supervise and provide technical assistance to Taxpayer Services Representatives 1 and Tax Information Aides who provide assistance to taxpayers or their representatives by answering questions and supplying information needed for taxpayers to effectively interact with the Department of Taxation and Finance (Tax); resolve issues/errors on returns and taxpayer accounts; perform testing activities with regard to new or existing systems; perform tax document and processing activities; and, when assigned, handle calls for other State agencies in addition to Tax.

Positions of Taxpayer Services Representative 2 are found in the Office of Processing and Taxpayer Services (OPTS) and the Consolidated Contact Center Division (CCD) at Tax.

Distinguishing Characteristics

Taxpayer Services Representative 2: first supervisory level; provides assistance on the more difficult phone calls, issues, and activities either related to requests for information or guidance in the interpretation of tax law, the proper filing of tax returns and the accompanying schedules, and/or the internal processing of tax returns.

Illustrative Tasks

Taxpayer Services Representative 2

Supervise Taxpayer Services Representatives 1 and Tax Information Aides.

- Oversee subordinates who answer questions while assisting taxpayers and their representatives in preparing forms and responding to notices about income, sales, corporation, and miscellaneous taxes; subordinates that answer calls from a range of other State agencies; and subordinates who perform account resolution, system testing, or tax document processing. Positions may individually perform more complex account resolution or system testing.
- Review written replies drafted by subordinates, and prepare written responses to the more complex requests from taxpayers, tax preparers, accountants, attorneys, and others.

- Monitor the performance of subordinates using real time and historical reporting systems.
- Evaluate performance using the quality system in place as well as the performance evaluation system.
- Provide technical assistance and advice to subordinate staff members.
- Furnish additional information or guidance to subordinates to enable them to answer non-routine questions.
- Resolve the issues and concerns of dissatisfied taxpayers, as needed, when a subordinate needs to escalate a call.
- Answer the more complex questions of subordinates, taxpayers, or their representatives regarding appropriate sections of the applicable tax law.
- Help maintain the knowledgebase content system used to assist in answering calls.
- Prepare weekly, monthly, and annual statistical/production reports.

Refer inquiries, unrelated to department operations or responsibilities, to the appropriate agency for reply.

Plan, review, and prioritize division inventories.

Act as a liaison to other program/tax areas.

Compute, or aid in the computation of, tax penalty and interest due on prior year tax returns and assessments.

Act as an instructor in department-wide formal or informal training classes, in cooperation with other divisions, and create training.

Independence of Operation

When assigned to the Contact Center, these positions, similar to Taxpayer Services Representative 1, are distinguished from other positions at Tax by their dual role of acting as an advocate for the public and advising the public of their own best interest in meeting their tax obligations under the law, all while also ensuring that Tax's policies and regulations under the law are met.

Communication

Incumbents in this class provide telephone, web-based, or correspondence assistance services for the general public or their representatives such as tax preparers, accountants, or attorneys. They must be professional, tactful, courteous, and helpful in their contacts with a variety of taxpayers with a wide range of problems. While assisting taxpayers with daily problems, incumbents attempt to increase taxpayers' knowledge and self-sufficiency.

In addition, incumbents communicate with their subordinates, peers, and supervisors for the purpose of the exchange and transmittal of information and the instruction and guidance of taxpayer assistance services and procedures.

Supervision Exercised

Taxpayer Services Representatives 2 supervise Taxpayer Services Representatives 1 and Tax Information Aides. They train, via classroom or on-the-job, new Taxpayer Services Representatives 1 and/or Tax Information Aides. Taxpayer Services Representatives 2 are also responsible for observing, reviewing, and mentoring subordinates. In addition, the Taxpayer Services Representative 2 serves as a subject matter expert for their staff.

Incumbents are supervised by a higher-level Taxpayer Services Specialist who assigns work to the Taxpayer Services Representative 2; applies priorities to the various requests for information; and provides technical expertise, guidance, and training. Requests that are above the knowledge and level of the Taxpayer Services Representative 2 are referred to the higher-level Taxpayer Services Specialist.

Complexity

Incumbents must possess a working knowledge of the provisions and requirements of the New York State Tax Law, Rules, and Regulations, and policies of the Tax Department, and, where applicable, municipal laws which are administered by the State; Federal Tax Laws, Regulations and Codes as they relate to New York State Tax Law; tax returns, applicable schedules, applications, registration forms, and department publications; reference material and resources and the capability of researching data to resolve more complex problems; departmental procedures governing the filing, payments and processing of returns, notices and bills; and the principles and practices of supervision.

Also, incumbents must have the ability to prepare most tax returns and schedules based on pertinent tax laws, rules, and regulations; present ideas clearly and orderly both orally and in writing in order to explain technical data to less than knowledgeable taxpayers or discordant taxpayers' representatives; comprehend, interpret, and explain technical and legal written material related to tax laws, rules, and regulations; act in a calm, courteous, and reasonable manner even under difficult circumstances; and interact with high-level staff such as directors and commissioners.

Positions located in a Contact Center environment will be required to use and understand multiple systems in place to review and monitor the performance of subordinates. These systems include both the Contact Center real and historical reporting system and the quality program in place to review subordinate performance. This requires the ability to review and analyze data.

Minimum Qualifications

Promotion: one year of permanent service as a Taxpayer Services Representative 1.

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

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