

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

Classification Standard

Occ. Code 0642100

Taxpayer Services Specialist 1, Grade 14	0642100
Taxpayer Services Specialist 2, Grade 18	0642200
Taxpayer Services Specialist 3, Grade 23	0642300
Taxpayer Services Specialist 4, Grade 27	0642400

Brief Description of Class Series

Taxpayer Services Specialists perform various technical activities that require an in-depth understanding and application of various tax laws and using automated processing systems in providing taxpayer information, assistance and technical support. These activities include program development and evaluation; identification of tax processing system requirements; testing of tax processing systems; administration of contracts governing processing activities; provision of taxpayer contact centers services; and the resolution of return processing errors, taxpayer protests, collections, and requests for refunds.

These positions are found only at the Department of Taxation and Finance (Tax).

Distinguishing Characteristics

Taxpayer Services Specialist 1: full performance level; non-supervisory technical specialist that performs a variety of difficult duties in resolving taxpayer protests and exceptions; testing automated tax systems and other technical support; administering contracts; and training staff.

Taxpayer Services Specialist 2: first and/or second supervisory level; oversees and provides assistance or technical expertise on more difficult tax processing activities and issues.

Taxpayer Services Specialist 3: second and/or third supervisory level; manages the overall operations of assigned unit(s) within a section; plans and oversees the day-to-day activities of teams of Taxpayer Services Specialists 2.

Taxpayer Services Specialist 4: manages the activities and operations of one or more sections within a bureau; evaluates production levels to ensure division goals are met; and oversees the performance of technical activities supportive of processing operations.

Illustrative Duties

Taxpayer Services Specialist 1

Research difficult legal and/or technical information relative to new legislation; interpretation of the tax laws; tax form changes; and system change requests, procedures, and policy directives to determine impact on operations and procedures.

Resolve difficult return processing errors, taxpayer protests, and requests for refunds.

Collaborate in developing and executing test conditions to ensure performance of automated processes and systems in conformance with legislative mandates and department requirements.

Identify processing system user needs.

Develop business requirements for inclusion in various Requests for Proposals (RFPs) issued by Tax.

Assist in the administering contracts governing processing activities.

Monitor collection vendor compliance to ensure contractual compliance.

Taxpayer Services Specialist 2

Supervise Taxpayer Services Specialists 1 and/or Taxpayer Services Representatives 2.

- Oversee subordinate staff and intervene and resolve problems as necessary.
- Determine staff assignments.
- Approve leave, and track time and attendance.
- Monitor and evaluate staff performance.
- Complete performance evaluations.
- Identify training needs and arrange for staff training.
- Manage and direct program activities by setting priorities and deadlines.

Disseminate technical assistance to staff engaged in assisting taxpayers and their representatives.

Plan, evaluate, develop, and implement changes and enhancements to third party processor systems.

Develop, monitor, and coordinate outsourced tax processing and cash management activities.

Analyze proposed and enacted legislation, regulations, and forms changes for impact on processing systems and unit workload.

Oversee the most difficult processing resolutions issues, including informal disagreements to assessments or adjusted refunds.

Direct user requirement development activities and execution of test conditions.

Interpret contract language and performance standards.

Taxpayer Services Specialist 3

Supervise Taxpayer Services Specialists 2.

Disseminate guidance to staff regarding the more technical and difficult issues associated with the workload of the unit.

Propose recommendations to management for process improvements.

Review and disseminate changes in Department, Division, or Bureau policy or procedure to subordinate staff.

Identify training needs for staff and administer staff training.

Taxpayer Services Specialist 4

Supervise Taxpayer Services Specialists 3.

Manage the application of proper provisions of tax law, rules, and regulations, and adherence to Department and Division policies and procedures.

Disseminate goals, expectations, policies, procedures, technical changes, assignments and instructions to subordinates.

Evaluate proposed changes to existing legislation, regulations, forms, instructions and other Department publications to determine their impact on the Division's strategic plan and overall mission.

Recommend revisions to policy directives, guidelines, procedure manuals and memoranda, and other technical materials to improve program performance levels and to reflect legislated or operational changes.

Communication

At all levels of this title series, incumbents must communicate effectively in writing and orally with taxpayers, taxpayers' representatives, and Department staff. Both written and oral communication must be accurate, clear, concise and timely. All types of contact with taxpayers and their representatives require diplomacy and tact. Incumbents must provide a thorough explanation of applicable law, policy and procedures.

Minimum Qualifications

Taxpayer Services Specialist 1

Open Competitive: associate's degree or completion of 60 college credit hours, and completion of a two-year traineeship.

Taxpayer Services Specialist 2

Promotion: one year of service as a Taxpayer Services Specialist 1 or Taxpayer Services Representative 2.

Taxpayer Services Specialist 3

Promotion: one year of service as a Taxpayer Services Specialist 2.

Taxpayer Services Specialist 4

Promotion: one year of service as a Taxpayer Services Specialist 3.

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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