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Springfield IL 62702
217.785.7570

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Chicago IL 60661
312.814.3190



JB Pritzker
Governor

David Harris
Director

STATE OF ILLINOIS
DEPARTMENT OF REVENUE

MEMORANDUM

To: The Honorable Don Harmon
Senate President

The Honorable Emanuel "Chris" Welch
Speaker of the House

The Honorable John F. Curran
Senate Republican Leader

The Honorable Tony M. McCombie
House Republican Leader

Mr. Tim Anderson
Secretary of the Senate

Mr. John Hollman
Clerk of the House

From: David Harris *DH*
Director

Date: May 4, 2023

RE: State Services Assurance Act

RECEIVED

MAY 04 2023

OFFICE OF
Secretary of the Senate

The State Services Assurance Act, Public Act 95-707, passed in November 2008, requires each state agency to report to the General Assembly annually their staffing level of bilingual employees.

Please find enclosed the report of bilingual employees currently employed at the Illinois Department of Revenue. Establishing positions with multilingual options and incorporating multilingual skills into existing positions allow our agency to provide better services more efficiently to the public.

Should you have any questions or need any additional information, please contact Phyllis Tate, Illinois Department of Revenue, EEO/AA Officer at 217/524-7003.

Employees at the Illinois Department of Revenue Receiving Bilingual Pay 5/3/2023

Full Name	Position Title	Language	Position No Full
CATALANO, ANTONINO	REVENUE TAX SPECIALIST 3	Italian	38573-25-01-110-11-03
CRUZ, EDGAR	REV TAX SPEC TRAINEE	Spanish Speaking	38575-25-82-110-51-02
GARCIA, HOLLY	REVENUE TAX SPECIALIST 1	Spanish Speaking	38571-25-41-240-51-02
LEYVA, EDUARDO A	REVENUE TAX SPECIALIST 2	Spanish Speaking	38572-25-33-100-99-02
LOPEZ, ARACELI	REVENUE TAX SPECIALIST 2	Spanish Speaking	38572-25-82-110-31-02
MENDIOLA, JULIO C	REV AUDITOR 3	Spanish Speaking	38373-25-41-130-99-02
PASILLAS, KARINA	REVENUE TAX SPECIALIST 1	Spanish Speaking	38571-25-82-110-51-02
PEREZ, III, LUIS F	REVENUE TAX SPECIALIST 2	Spanish Speaking	38572-25-48-100-99-02
PORTILLO, CINDY L	REVENUE TAX SPECIALIST 1	Spanish Speaking	38571-25-48-570-01-02
RODRIGUEZ, CINDY	REV COLLECTION OFR 3	Spanish Speaking	38403-25-48-510-10-02
RODRIGUEZ, ELIZABETH	REVENUE TAX SPECIALIST 2	Spanish Speaking	38572-25-31-170-99-02
RODRIGUEZ, LUIS	REVENUE TAX SPECIALIST 3	Spanish Speaking	38573-25-82-110-51-02
SILVA, CESAR J	REVENUE TAX SPECIALIST 1	Spanish Speaking	38571-25-48-100-99-02
VALDIVIA, MAGDA	REVENUE TAX SPECIALIST 3	Spanish Speaking	38573-25-01-110-11-02
YEE, LILY T	REVENUE TAX SPECIALIST 3	Chinese	38573-25-01-120-11-02
ZAMBRANO, RICARDO	REV COLLECTION OFR 3	Spanish Speaking	38403-25-48-530-10-02



1. POSITION TITLE		WORKING TITLE (IF ANY)		Bilingual Code	Position Title Option Code	2. POSITION NUMBER			
Existing Position		DEC 14 2012				38573-25-01-100-99-03			
New/Revised Position		A & R SHARED SERVICES CENTER		15	IT	38573-25-01-110-11-03			
3. AGENCY		4. BUREAU/ DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH.	8. AUDIT	9. OFFICE USE	
Existing Position									
New/Revised Position		Board of Appeals		0	016	Y	R		
10. SECTION		11. UNIT		12. TRANSACTION CODE		13. EFFECTIVE DATE			
Existing Position						11/01/12			
New/Revised Position		BOA Support							
14. WORK LOCATION		15. BARGAINING/TERM CODE		Rulan Exempt	<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MC022 EXEMPT CODE CHANGE <input checked="" type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION				
Existing Position									
New/Revised Position		Cook		N					
% OF TIME		16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS							
		<p>Under general direction, serves as an advanced specialist in resolving technical, legal or procedural issues concerning all taxes administered by the Department of Revenue or debts referred to the Board of Appeals via petition to review and consider waiver, abatement, or reduction of tax penalty and interest due Department of Revenue; performs in-depth collection duties of a highly specialized nature involving the most complex, sensitive and priority in-state and out-of-state tax accounts referred to the Board of Appeals; analyzes the GenTax or other PC systems; determines the total account balance and computes interest on all types of taxes; recommends and coordinates the actions of lower level Revenue Tax Specialists (RTS) and Collectors; confers with taxpayers and their representatives providing information in technical or lay terms depending upon tax knowledge of the taxpayer and recommends various courses of action; provides technical assistance to lower level staff; participates in special project assignments; participates in agency training programs; compiles and prepares a variety of weekly, monthly and special reports. Speaks and writes Italian fluently in order to confer/correspond with taxpayers, their representatives and others during their dealing with the Board of Appeals and other areas of the Chicago Office.</p>							
25%		<p>1. Receives, reviews and analyzes problematic, complex, technical, sensitive and/or high priority in-state and out-of-state accounts assigned to the Board of Appeals involving the various taxes administered by the Department of Revenue to determine the most appropriate Board recommendations; verifies taxpayer financial information; analyzes, determines and documents adjustments required for all major tax systems and debts referred from other state agencies to resolve and/or amend current debt reflected; initiates liens and monitors status; analyzes Board of Appeal petitions; carries tubs containing tax documentation weighing up to 25 pounds; performs an in-depth analysis of accounts being reviewed for specific Board recommendations; accesses the case in GenTax and documents all pertinent information; prepares and prints remittance processing documents, when appropriate and directs the liability to the proper account period; reschedules or transfers the case as necessary.</p>							
15%		<p>2. Recommends and coordinates the actions of lower level RTS and Collectors as necessary for simultaneous activities such as, filing of liens, monitoring of Temporary Restraining Order (TRO), Offers in Compromise Board ordered pay plans, conditional TRO's offsets, monitoring the various actions necessary to resolve a case, etc. If adjustments are necessary to an account, ensures adjustments are completed timely and accurately; monitoring and recommending any follow-up action notifying the taxpayer and representative of case resolution. Consults with RTSS and Collectors, ensuring taxpayers are receiving fair and equitable treatment.</p>							

DIRECTOR OF CMS SIGNATURE <i>Jayne Bethard</i> 21 12-10-12	IMMEDIATE SUPERVISOR SIGNATURE <i>PERSONNEL</i> 12-6-2012 Tech Services	AGENCY HEAD SIGNATURE <i>Brian Hammer</i> 11/30/12 1113 Westmore	DATE
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16. (CONTINUED)

% OF TIME	
15%	3. Confers by telephone, correspondence and/or in person with taxpayers, their representatives and/or others to secure missing information or additional information needed to make a fair and equitable recommendation to the Board Chairman on the status of a specific Board petition. Speaks and writes Italian fluently in order to confer/correspond with taxpayers, their representatives and others that are unable to speak or write English while dealing with the Board of Appeals and/or other areas of the Chicago Office.
10%	4. Utilizing GenTax or other PC systems, accesses delinquent taxpayer cases; reviews and analyzes on-line information to determine the nature of the delinquencies and/or assessments, information regarding the taxpayers or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation, or any transactions that have changed the status of the case; analyzes the on-line information in order to recommend action that needs to be taken, such as phone contact, correspondence, research or other collection action; records any action taken using action codes and/or comments. Where necessary, obtains and documents financial, asset, secondary or other information regarding a taxpayer case; generates correspondence by selecting the assessment and delinquency detail and any variable information needed to construct the document. On taxpayer initiated contacts, accesses the case in GenTax, analyzes the case as documented above; determines where the case is residing and understands the type of action being taken by that location; takes or recommends the appropriate Board action.

17. POSITION TITLE AND NUMBER OF IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

Public Service Administrator 37015-25-01-110-00-01	WORKING TITLE (IF ANY)
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18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

SUPERVISOR OR LEAD WORKER

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted.

If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount:

Position Title	Position Number	No. of Incumbent or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. **NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.**

Requires a Bachelor's degree and seven years supportive tax related experience, including completion of the Revenue Tax Specialist Trainee program and three years as a Revenue Tax Specialist II or requires fifteen years of supportive tax related experience, including completion of the Revenue Tax Specialist Trainee program and three years as a Revenue Tax Specialist II; requires extensive knowledge of current Illinois and federal tax laws, rules and regulations and out-of-state tax filing requirements; requires thorough knowledge of forms and documents utilized in the processing of tax returns and supporting documents; requires thorough knowledge of files, procedural manuals and other related materials utilized in their research and analysis of tax returns and supporting documents; requires extensive knowledge of tax accounting theory, principles and practices; requires extensive knowledge of computer systems, as related to the processing of various tax information; requires extensive knowledge of manual and automated office equipment; requires extensive knowledge of public relations principles and practices; requires extensive knowledge of methods, procedures and techniques utilized in developing and implementing training programs for technical staff in the review and analysis of tax returns and supporting documents; requires extensive knowledge of methods and procedures used in compiling and recording statistical information; requires ability to gain and maintain satisfactory working relationships with the public, other state and federal agencies, and other employees; requires ability to detect noncompliance with Illinois state tax laws and regulations; requires ability to detect computational, legal and/or technical errors in the process of analyzing tax returns and supporting documentation. Requires ability to take complex manual and automated corrective action within broad guidelines in cases involving delinquencies, deficiencies and other irregularities. Requires ability to converse and communicate in a clear and concise manner with persons at all organizational levels inside and outside the department. Requires ability to speak and write Italian at a colloquial skill level. Requires ability to lift and carry boxes of tax documents weighing up to 25 pounds

% OF TIME

- 10% 5. Provides technical assistance to other Revenue Tax Specialists and Revenue Tax Specialist Trainees; provides on-the-job technical training to new staff in applicable work methods and procedures; makes recommendations to revise operating procedures, when applicable and participates in the development and testing of new procedures, changes in operating systems, correspondence, etc.
- 10% 6. Participates in staff meetings; assists supervisor in developing new and/or revised operating policies and procedures, staffing requirements, work schedules, etc., recommending changes in procedures to expedite work flow, etc., and upon approval by management, ensures the implementation thereof. Participates in special project assignments. Compiles and prepares a variety of weekly, monthly and special management productions statistical and informational reports.
- 05% 7. Recommends various courses of action, including jeopardy and penalty assessments, including responsibility for issuing penalties transferring corporate debt to responsible officers, determining extension of time for tax payments, and closing of cases determined to be uncollectable; recommends disposition of cases supported by documented information and evidence.
- 05% 8. Coordinates the maintenance and operation of the Board of Appeal program and the specific software that controls its operation; trains users on technical system features; monitors and evaluates the performance of the system.
- 05% 9. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.

RECEIVED

DEC 14 2012

**A & R SHARED
SERVICES CENTER**

RECEIVED
NOV 26 2012
By _____

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue Tax Specialist Trainee				29	SS		38575-25-82-110-51-02		
3. AGENCY			4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/ AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue			Taxpayer Services/Customer Service/Taxpayer Assistance/		0	016	2	R	
10. SECTION			11. UNIT		12. TRANSACTION CODE		13. EFFECTIVE DATE		
EXISTING POSITION					<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION		02/16/2023		
NEW/REVISED POSITION									
Chicago Field Services									
14. WORK LOCATION			15. BARGAINING/TERM CODE		RUTAN EXEMPT				
EXISTING POSITION									
NEW/REVISED POSITION									
Cook County			RC062		N				
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS								
30%	<p>1. Under immediate supervision, for a period of six (6) to twelve (12) months, receives structured classroom and on-the-job training involving various facets of the Customer Services Bureau's programs and operations relative to the processing of all types of taxes:</p> <ul style="list-style-type: none"> In a controlled environment, receives classroom and on-the-job training involving the review, examination, completion and processing of original and amended tax returns, schedules, correspondence, business registration applications, procedural aspects of applicable rules, regulations and policies, highly technical tax systems to determine filing requirements, filing history and multiple complex tax segment payment applications and other documents of increasing difficulty at a professional level relative to Customer Services Bureau's activities and operations Receives training on use of multiple computer system applications, account resolution and adjustment processes, as well as basic letter writing, telephone and interpersonal skills Communicates effectively with English and Spanish speaking taxpayers or their representatives via telephone, personal contact and/or written communications. 								

<p>25%</p>	<p>2. Receives and completes assignments of a routine and progressively more involved nature in specific phases of the tax examining process in accordance with established laws, rules, policies, and procedures, including but not limited to the review and examination of all types of taxes to verify that all necessary data has been entered on returns and the validity of deductions taken:</p> <ul style="list-style-type: none"> • Reviews payments and/or attached remittances to ensure they cover the tentative amount of tax owed • Reviews and examines original and amended returns, business registration applications, schedules, correspondence, and other documents for correctness and accuracy • Verifies computations are accurate and compares computer printouts with returns/applications • Initiates and completes adjustment action • Computes tax, penalty and interest at the applicable statutory rates • Verifies mathematical accuracy of returns and allied documents • Operates a personal computer to input changes, corrections, deletions and/or additions to online or manual systems • Inputs necessary information to initiate taxpayer correspondence • Walks, stands, bends, reaches above shoulder level and lifts and carries tax documents weighing up to 25 pounds in performance of duties.
<p>20%</p>	<p>3. Confers with taxpayers in English and Spanish through written and verbal communications:</p> <ul style="list-style-type: none"> • Initiates correspondence to taxpayers requesting clarification of tax reporting information • Provides information and assistance to Illinois and out-of-state English and Spanish speaking taxpayers, their representatives and other Illinois Department of Revenue (IDOR) personnel by telephone, personal contact and correspondence on matters relating to the tax processes and business registration applications.
<p>10%</p>	<p>4. Receives a combination of classroom and on-the-job training of the laws administered by IDOR, rules and regulations, tax forms, research methods and procedures, communication skills and computer usage/concepts:</p> <ul style="list-style-type: none"> • Receives classroom and on-the-job instructions and training relative to tax laws, rules, regulations, policies and procedures governing work assignments • Receives classroom and extensive on-the-job training regarding telephone usage, skills and etiquette to promote effective and efficient communication with taxpayers and/or their representatives • Receives on-the-job training on computer usage and system applications • Inputs corrective adjustment commands into taxpayer accounts • Performs various research functions in order to resolve taxpayer accounts and/or to answer taxpayer inquiries.
<p>10%</p>	<p>5. Receives basic technical training in specialized operations to enable the trainee to assist in priority situations:</p> <ul style="list-style-type: none"> • Participates in project assignments

	<ul style="list-style-type: none"> Assists supervisor in more difficult work projects as part of the learning process Travels in the performance of job duties.
05%	6. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

Public Service Administrator	37015-25-82-110-50-01	WORKING TITLE (IF ANY) Chicago Field Services Manager
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18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

- Supervisor Lead Worker

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications


- Requires a bachelor's degree.
-OR- Requires eight years of work experience with the Department of Revenue.
- Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Qualifying state employees in the employee Upward Mobility Program, may complete combinations of specific proficiency tests and training programs leading to a certificate of proficiency in lieu of the stated requirements for this class.

Preferred Qualifications (In Order of Significance)

20. CONDITIONS OF EMPLOYMENT

- Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
- Requires the ability to travel.
- Requires the ability to walk, stand, bend, reach above shoulder level, and lift and carry tax documents weighing up to 25 pounds.
- Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.

<p>21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.</p> <p>The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, thirteen holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).</p>			
<p>22. ABOUT THE AGENCY/BUREAU/PROGRAM</p> <p>The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.</p> <p>IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.</p>			
DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<p><i>Raven DeVaughn by Jonathan W. Johnson 3/1/2023</i></p>			02/21/2023

JL

1. POSITION TITLE	WORKING TITLE (IF ANY)	BILINGUAL CODE	POSITION TITLE OPTION CODE	2. POSITION NUMBER				
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue Tax Specialist I		29	SS	38571-25-41-240-51-02				
3. AGENCY	4. BUREAU/DIVISION	5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH	8. AUDIT	9. OFFICE USE		
EXISTING POSITION								
NEW/REVISED POSITION	Audit/Audit Discovery & Recovery	0	084	2	R			
Revenue								
10. SECTION	11. UNIT	12. TRANSACTION CODE		13. EFFECTIVE DATE				
EXISTING POSITION				03/16/2023				
NEW/REVISED POSITION				<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY				
Lifestyle/Nexus/Discovery (LND)	Federal/State Exchange			<input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION				
14. WORK LOCATION	15. BARGAINING/TERM CODE	RUTAN EXEMPT						
EXISTING POSITION								
NEW/REVISED POSITION								
Sangamon County	RC062	N						
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS							
20%	1. Under general supervision, at a developmental level, responds to inquiries from taxpayers and Illinois Department of Revenue (IDOR) employees regarding status of cases and other accounts, assessments, statutes of limitation, statutory notices, application of laws, rules, regulations, letter rulings, legal opinions, policies and procedures, claims, refund inquiries, interest computations, penalties, etc., in resolving audits, limited scope assignments, compliance projects, hearing cases, etc.: <ul style="list-style-type: none"> • Determines nature of inquiries • Researches IDOR records or applicable regulatory references to resolve issues or to provide general information concerning laws, procedures and practices. 							
20%	2. Speaks to English and Spanish speaking taxpayer groups regarding tax laws: <ul style="list-style-type: none"> • Provides information, assistance and instruction to taxpayers as relates to filing requirements, IDOR policies and procedures • Assists taxpayers in preparing tax returns including all attachments • Compiles information and completes claims for property tax relief • Provides tax forms, brochures, publications, and documents requested by taxpayers 							

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Explains filing and payment procedures.
15%	<p>3. Examines and analyzes IRS and other state audit reports to determine effects on Illinois returns:</p> <ul style="list-style-type: none"> • Compares federal and state income records of taxpayers • Researches IDOR records, taxpayer records, return copies, etc. • Determines if adjustments are properly reported, and if not determines tax liability and other documents using Personal Computer and manual applications • Reviews content, accuracy and proper application of regulations, laws, and procedures • Analyzes and processes responses and documents from taxpayers to notices for accuracy, validity and appropriateness • Prepares original or amended returns calculating penalty and interest, processes remittance, etc.
15%	<p>4. Provides advice and assistance to taxpayers and IDOR personnel on technical and/or procedural problems in reviewing Revenue Agent Report, Federal/State Exchange accounts, audit files, Board of Appeals petitions, claims for credit, various tax returns etc.:</p> <ul style="list-style-type: none"> • Answers taxpayer inquiries while adhering to the strict security and confidentiality of all state and federal tax information with full understanding of disclosure law.
10%	<p>5. Reviews completed accounts and conducts in-depth analysis of cases identifying methods used and any special or unique issues in review:</p> <ul style="list-style-type: none"> • Researches IDOR records verifying account was completed properly and accurately • Analyzes work papers and verifies conclusions are substantiated and properly reflected • Confirms legality by ensuring documents are properly signed, completed and amount of taxes, penalties and interest agree and are within statutory periods • Detects additional monies due or owed, legal, procedural and/or mathematical errors • Maintains and prepares statistics, records, inventories, reports, manuals and files as directed by management • Lifts and carries tubs of work weighing up to 25 pounds.
05%	<p>6. Determines proper method to implement audit results, legal settlements, hearing decisions, etc., into the computer system:</p> <ul style="list-style-type: none"> • Prepares line instructions on changes made in the account • Computes penalty and interest amounts, and forwards for processing • Determines penalty and interest dates • Refers to tax act, regulations, package X, etc. • Prepares adjustment forms to post checks timely and routes completed forms with remittance, prepares forms to release funds, etc.
05%	<p>7. Participates in special assignments of a technical or specialized tax nature:</p>

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Serves as a member of a test team • Assists in developing new and revised procedures relating to specific programs and participates in selected aspects of training classes and informational seminars as part of the developmental learning process.
05%	<p>8. Assists in training other employees in processing procedures, research methods and techniques, operation and use of personal computer hardware and software applications relevant to various tax programs:</p> <ul style="list-style-type: none"> • Assists others in resolving technical, mathematical and procedural problems • Assists in the review of completed work of others engaged in performing similar work.
05%	<p>9. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

WORKING TITLE (IF ANY)

Public Service Administrator	37015-25-41-240-50-01
Public Service Administrator	37015-25-41-240-50-02

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

Supervisor Lead Worker

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.


Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires a bachelor's degree and completion of the Revenue Tax Specialist Trainee Program. -OR- Requires nine years' Department of Revenue experience, including completion of the Revenue Tax Specialist Trainee Program.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

20. CONDITIONS OF EMPLOYMENT			
<p>1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.</p> <p>2. Requires the ability to lift and carry tubs of work weighing up to 25 pounds.</p> <p>3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.</p>			
<p>21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is <u>NOT</u> intended to be all-encompassing or to address all responsibilities of the position.</p> <p>The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, thirteen holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).</p>			
22. ABOUT THE AGENCY/BUREAU/PROGRAM			
<p>The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.</p> <p>IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.</p>			
DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Raven DeVaughn by Lindsay Vogel</i> 3/16/2023			03/15/2023

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE	2. POSITION NUMBER		
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue Tax Specialist II				29	SS	38572-25-33-100-99-02		
3. AGENCY		4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/ AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue		Account Processing/Central Processing		0	084	2	R	
10. SECTION		11. UNIT		12. TRANSACTION CODE		13. EFFECTIVE DATE		
EXISTING POSITION						12/16/2022		
NEW/REVISED POSITION								
14. WORK LOCATION		15. BARGAINING/TERM CODE		RUTAN EXEMPT		<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION		
EXISTING POSITION								
Sangamon								
NEW/REVISED POSITION								
Sangamon County		RC062		N				
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS							
25%	<p>1. Under general direction, reviews, analyses and evaluates routine, non-routine, and highly technical original tax returns, amended returns, audit returns, schedules, refund claims, claims for credit, requests for "reasonable cause" accommodation, requests to "protest", registration applications, license/certificate renewals, and other tax-related transactions for all tax types administered by the Central Processing Bureau (CPB):</p> <ul style="list-style-type: none"> Utilizes all research resources that are available (i.e., Internet, intranet, legal ruling letters, on-line inquiry data, statutes, regulations, policy directives, paper document records, digital records, etc.), to determine the appropriate corrective action to be taken Reviews and works taxpayer notices, incoming correspondence (i.e., telephone, mail, fax, e-mail, etc.), manual and computer system account records, flagged and suspended transactions, priority accounts, legislative referrals, disputed billings, and other increasingly complex documents or electronic transactions to ensure the completed work or account adjustments comply with tax laws, rules, and regulations as well as mathematical, technical, and procedural accuracy Detects fraudulent or suspicious paper- and electronically- filed returns and notifies the appropriate staff 							

	<ul style="list-style-type: none"> • Makes factual and technical determinations, initiates manual or computer system corrective, adjustment, or billing/refund actions, to resolve discrepancies, deficiencies or processing errors and ensures the processing system has accepted the transactions • Meets the established performance measure standards within the work area assigned • Lifts and carries tax documents weighing up to 25 pounds • Assigned throughout CPB, as needed, to processing duties associated with the numerous taxes administered by the bureau.
10%	<p>2. Computes tax, penalty, and interest due or payable:</p> <ul style="list-style-type: none"> • Explains these computations to Spanish- and English-speaking taxpayers, or their representatives, when working a specific taxpayer's account, or explains the method for computing these amounts in response to general inquiries • Utilizes supporting documentation, such as federal and out-of-state documents, to aid in computations • Performs routine and complex mathematical calculations • Disallows return discounts, deductions, or modifications, when appropriate • Adjusts tax accounts to reflect Board of Appeals or Administrative Hearings case dispositions • Cancels all or portions of assessments, bills, claims, refunds, etc. • Calculates the proper allocation of revenues to local municipalities in accordance with statutes.
10%	<p>3. Approves or denies reasonable cause requests based on procedural and statutory guidelines:</p> <ul style="list-style-type: none"> • Follows established guidelines and procedures to approve or deny abatement of penalties and/or interest • Requests additional information from taxpayers, or their representatives, in order to have sufficient information to approve or deny reasonable cause • Informs taxpayers, or their representatives, of the decision.
10%	<p>4. Independently utilizes all resources available to determine the appropriate corrective actions necessary to adjust taxpayers accounts:</p> <ul style="list-style-type: none"> • Reconstructs taxpayer history • Determines validity and accuracy of returns and claims through research (e.g., reviewing statutes, rules, etc.) • Updates numerous office-support or tax-support database files, as assigned.
10%	<p>5. Corresponds with both Spanish- and English-speaking taxpayers, or their representatives, via written and oral communication regarding Illinois and out-of-state individual, corporate, fiduciary, excise, and sales tax, in order to facilitate account processing:</p> <ul style="list-style-type: none"> • Seeks additional documentation, or forms needed, to resolve discrepancies or disputed account balances • Assists taxpayers, their representatives, and others regarding laws administered by Illinois Department of Revenue (IDOR) • Gives advice regarding appropriate action necessary for compliance

	<ul style="list-style-type: none"> Provides assistance and guidance to taxpayers in the completion of all types of amended returns, including all supporting documentation necessary, to resolve discrepancies, deficiencies, or other errors.
10%	<p>6. Serves as a member on special projects or test teams assigned to perform specific tasks during the design, development, testing and implementation of new processes or automated systems:</p> <ul style="list-style-type: none"> Assists in the identification and resolution of problems associated with designing, implementing and integrating electronic registration, electronic filing and electronic payment programs Responds to technical inquiries from electronic commerce program participants and vendors Provides input during the design of new or revised tax forms and supporting documents Writes and updates processing procedures.
10%	<p>7. Provides on-the-job training to other staff relating to processing non-routine and highly technical amended tax returns, schedules, supporting documentation, claims for refund, computer-generated notices, correspondence, and manual and automated account records.</p>
05%	<p>8. Quality reviews the completed work of staff within an assigned work area:</p> <ul style="list-style-type: none"> Serves as a member of quality review teams in searching for and identifying more effective ways to accomplish the work Recommends improved methods of operation to supervisors.
05%	<p>9. Maintains a variety of production statistics, inventory records, and various reports both on a regular basis and upon request from Management.</p>
05%	<p>10. Performs other duties as required or assigned, which are reasonably within the scope of the duties enumerated above.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

WORKING TITLE (IF ANY)

Senior Public Service Administrator	40070-25-33-120-00-01
Public Service Administrator	37015-25-33-120-10-01
Public Service Administrator	37015-25-33-120-20-01
Public Service Administrator	37015-25-33-120-30-01
Public Service Administrator	37015-25-33-120-40-01
Public Service Administrator	37015-25-33-120-50-01
Public Service Administrator	37015-25-33-130-10-01
Public Service Administrator	37015-25-33-130-20-01
Public Service Administrator	37015-25-33-130-30-01
Public Service Administrator.	37015-25-33-130-40-01
Public Service Administrator	37015-25-33-130-50-01
Public Service Administrator	37015-25-33-140-10-01

Public Service Administrator	37015-25-33-140-20-01	
Public Service Administrator	37015-25-33-140-30-01	
Public Service Administrator	37015-25-33-160-10-01	
Public Service Administrator	37015-25-33-160-30-01	
Public Service Administrator	37015-25-33-160-40-01	
Public Service Administrator	37015-25-33-160-50-01	

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

Supervisor Lead Worker

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

- Minimum Qualifications
- Requires a bachelor's degree AND requires four years' supportive tax related experience, including completion of the Revenue Tax Specialist Trainee Program, and three years as a Revenue Tax Specialist I
-OR-
 - Requires twelve years' supportive tax related experience, including completion of the Revenue Tax Specialist Trainee Program, and three years as a Revenue Tax Specialist I.

Preferred Qualifications (In Order of Significance)

20. CONDITIONS OF EMPLOYMENT

- Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
- Requires ability to lift and carry materials weighing up to 25 lbs.

21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, twelve holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Anthony Pascente</i> <i>By: D. Skant</i> <i>JL</i> 1/13/23		<i>[Signature]</i>	12/21/2022

1. POSITION TITLE	WORKING TITLE (IF ANY)	BILINGUAL CODE	POSITION TITLE OPTION CODE	2. POSITION NUMBER				
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue Tax Specialist II		29	SS	38572-25-82-110-31-02				
3. AGENCY	4. BUREAU/DIVISION	5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH	8. AUDIT	9. OFFICE USE		
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue	Taxpayer Services/Customer Service	0	016	2	R			
10. SECTION	11. UNIT	12. TRANSACTION CODE			13. EFFECTIVE DATE			
EXISTING POSITION		<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			08/01/2021			
NEW/REVISED POSITION								
Taxpayer Assistance	Northern Field Services/Des Plaines							
14. WORK LOCATION	15. BARGAINING/TERM CODE	RUTAN EXEMPT						
EXISTING POSITION								
NEW/REVISED POSITION								
Cook County	RC062	N						

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
30%	<p>1. Under general direction, at a journeyman level, analyzes and adjusts non-routine and highly technical original and amended tax returns, schedules, and/or supporting documentation:</p> <ul style="list-style-type: none"> • Analyzes and adjusts non-routine and highly technical original and amended tax returns, schedules, and supporting documentation, computer generated notices, correspondence, manual and automated account records, priority accounts, legislative referrals, disputed billings, reasonable cause requests, and other documents of increasing difficulty for compliance with tax laws, rules and regulations, mathematical, technical and procedural accuracy • Makes factual and technical determinations and initiates manual or automated corrective, adjustments, edit and billing action to resolve discrepancies and deficiencies to allow the processing system to accept the return • Executes priority adjustments and/or responds to priority referrals if adjustments cannot be completed based on statutes, rules, etc. • Verifies account status and receipted payments to requesting parties • Collects payments via credit card or checks from Taxpayers, enters payment into cashiering system and deposits through current vendor • Researches computer records, files and other resource material to determine nature of inquiry, e.g., filing requirements, account status information, billing problems, accounts receivable, interpretation of laws or rules, etc. • These functions include walking standing, bending, reaching above shoulder level and lifting and carrying tax documents weighing up to 25 pounds.
20%	<p>2. Reviews and researches various source documents in providing information, technical guidance and assistance to Illinois and out-of-state taxpayers and/or their representatives, in writing and orally of a routine and priority nature, relating to the various taxes administered by the Illinois Department of Revenue (IDOR) in addition to interpretation of the Illinois Business Registration, and Electronic Filing Application rules and regulations:</p> <ul style="list-style-type: none"> • Provides technical assistance and guidance in English and Spanish on laws, rules and regulations, and IDOR policies and procedures as relates to all tax acts or IDOR programs to individual taxpayers and/or their representatives, both orally and in writing, by analyzing, evaluating and determining the resolution of difficult and complex cases concerning various taxes and tax accounts • Receives calls referred by staff and diffuses antagonistic or hostile situations • Confers in English and Spanish, via toll-free telephone lines, in person or by correspondence with taxpayers and/or their representatives, answering technical inquiries • Confers with other areas of the IDOR to resolve problem accounts, e.g., Information Processing, etc., to resolve problems and/or to obtain solutions/answers • Assists taxpayers and/or their representatives in preparing business registration forms, general, amended, supplemental and delinquent tax returns, including documents for individuals, partnerships, corporations, partnerships, estates, trusts and fiduciaries regarding account status, laws administered by IDOR, additional documentation or forms needed to resolve discrepancies answering technical inquiries and balances owed, etc.

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
10%	<p>3. Independently performs research necessary to resolve discrepancies or deficiencies:</p> <ul style="list-style-type: none"> • Determines research methods necessary for resolution of discrepancies or deficiencies in order to adjust taxpayer accounts • Researches all resources available to determine corrective action to be taken • Reconstructs taxpayer history • Researches historical documents, statutes and rules to determine validity and accuracy of returns and assessments • Computes tax penalty and interest due or payable • Performs and perfects mathematical calculations and procedures in computing tax liability modifications, canceling all or portions and applicable penalty and interest, disallowed discounts, or of assessments and/or bills and allocation of revenues in accordance with statutes outlining these procedures • These functions include walking, standing, bending, reaching above shoulder level and lifting and carrying tax documents weighing up to 25 pounds.
10%	<p>4. Approves or denies reasonable cause requests; confers in English and Spanish with taxpayers and/or their representatives to determine the nature of inquiries, problems or complaints and initiates correspondence in English and Spanish to assist taxpayers and their representatives:</p> <ul style="list-style-type: none"> • Approves or denies reasonable cause requests or denies abatement of penalties and/or interest requests based on procedural and statutory guidelines • Requests in English and Spanish additional information from taxpayers and/or their representatives in order to approve or deny reasonable cause • Informs taxpayers and their representatives in English and Spanish of the decision rendered • Initiates both written and/or communication in English and Spanish to assist taxpayers and their representatives regarding account status, laws administered by the IDOR, additional documentation or forms needed to resolve discrepancies, balances owed, etc. • Gives advice in English and Spanish regarding appropriate action to be in compliance • Prepares documentation to change tax liability, penalty and interest • Provides amended returns, including all supporting documentation necessary to assist taxpayers and resolve discrepancies or deficiencies.
10%	<p>6. Assists supervisor as a quality review team member, as a trainer and in preparing and maintaining reports and production records:</p> <ul style="list-style-type: none"> • Monitors and quality controls telephone calls received by peers and lower level staff • Quality reviews assigned work completed by peers and lower level staff • Trains same or lower level staff in work processes • Maintains a variety of production records, reports, inventory, etc. • Compiles and prepares reports as requested.

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
10%	<p>7. Will be assigned throughout the Customer Service Bureau to assist in higher level tax related duties as required, to serve on special project or test teams and will assist field auditors and collectors on a limited or as needed basis:</p> <ul style="list-style-type: none"> • Will be assigned to other areas of the Customer Service Bureau to assist in workload demands as part of the developmental phase • Serves as a member of special project or test teams, testing new procedures and/or automated systems • Serves as a technical team member in testing new and revised changes in computer logic • Participates in technical forms committee • Assists in evaluating new and pending legislation to determine impact on bureau operations • Provides input in the development of new or revised tax forms and other tax information related material that may be provided to staff and/or taxpayers • Writes and/or updates procedures as assigned • Assists field auditors and/or field collectors on a limited or as needed basis by providing information relative to status of accounts, filing status, etc. • Assists with outreach programs as directed • Travels in the performance of these duties.
05%	<p>5. Responsible for registering and maintaining business tax accounts and reviews and analyzes non-routine and priority tax correspondence:</p> <ul style="list-style-type: none"> • Registers and maintains business tax accounts • Reviews and analyzes non-routine and priority tax correspondence directed to the Customer Service Bureau from outside sources and agency officials to determine nature and content • Initiates corrective action to resolve inquiries.
05%	<p>8. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>
<p>17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)</p>	
Public Service Administrator	37015-25-82-110-30-01 WORKING TITLE (IF ANY)
<p>18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:</p>	
<p><input type="checkbox"/> Supervisor <input type="checkbox"/> Lead Worker</p>	
<p>NOTE: Supervisory or lead worker responsibilities <u>must</u> be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.</p>	

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires a bachelor's degree.
2. Requires four years supportive tax related experience, including completion of the Revenue Tax Specialist Trainee Program, and three years as a Revenue Tax Specialist I.
3. -OR- Requires twelve years supportive tax related experience, including completion of the Revenue Tax Specialist Trainee Program, and three years as a Revenue Tax Specialist I.
4. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Knowledge, Skills, and Abilities

1. Requires working knowledge of current Illinois and federal tax laws, rules and regulations and out-of-state filing requirements.
2. Requires working knowledge of tax terminology, forms and documents utilized in the processing of tax returns and supporting documentation.
3. Requires working knowledge of methods and procedures used in compiling and recording statistical information
4. Requires working knowledge of manual and automated files, procedural manuals and other related material utilized in the research and analysis of tax returns and supporting documentation for compliance with applicable tax regulations.
5. Requires working knowledge of tax accounting theory, collection procedures, principles and practices.
6. Requires working knowledge of computer systems as related to the processing of various tax information.
7. Requires working knowledge of public relations principles and practices.
8. Requires ability to independently take corrective action within broad general guidelines in cases involving delinquencies, deficiencies and other irregularities.
9. Requires ability to gain and maintain satisfactory working relationships with the public and other employees.
10. Requires ability to compose correspondence to taxpayers, their representatives and others.

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires a valid driver's license and the ability to travel.
3. Requires the ability to walk, stand, bend, reach above shoulder level, and lift and carry tax documents weighing up to 25 pounds.

21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

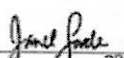
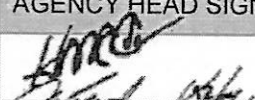
The Illinois Department of Revenue (IDOR) is seeking to hire a highly motivated individual to serve in our Northern Field Services Des Plaines office as Revenue Tax Specialist II Spanish speaking (RTS II SS). This RTS II SS will assist taxpayers with their Illinois Individual, Business and Withholding Income Tax and Sales Tax as well as business registration inquiries. Interpersonal skills along with excellent customer service skills will be utilized when working with the department staff, taxpayers, businesses and local governments. The RTS II SS will utilize previously developed professional oral and written communication skills in working with, assisting and training these same individuals and groups.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, twelve holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

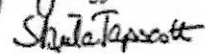
22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
			08/13/2021

08/20/2021 JL



9/2/21



1. POSITION TITLE		WORKING TITLE (IF ANY)		Bilingual Code	Position Title Option Code	2. POSITION NUMBER				
Existing Position										
New/Revised Position										
Revenue Auditor III				29	SS	38373-25-41-130-99-02				
3. AGENCY			4. BUREAU/ DIVISION			5. EXMT CODE	6. WORK COUNTY	7. A1 AUTH.	8. AUDIT	9. OFFICE USE
Existing Position			Audit							
New/Revised Position			Audit/ Field Compliance							
Revenue			Audit/ Field Compliance			0	016	2	R	
10. SECTION			11. UNIT			12. TRANSACTION CODE		13. EFFECTIVE DATE		
Existing Position								4/14/21		
New/Revised Position			Field - Des Plaines							
Sales and Miscellaneous Taxes			Field - Des Plaines							
14. WORK LOCATION			15. BARGAINING/TERM. CODE			Rutan Exempt				
Existing Position										
New/Revised Position			RC062			N				
Cook County			RC062			N				
16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS										
%	<p>Under direction, regularly conducts highly complex Illinois and/or out-of-state computerized audits of multi-national corporations, unitary businesses, major corporations, industries and individual taxpayers subject to all taxes administered by the Illinois Department of Revenue (IDOR); examines and analyzes records and accounts to determine compliance or non-compliance with tax rules, regulations and laws; serves as an auditor-in-charge, assigning, directing and reviewing the activities of an audit team engaged in conducting complex and large scale audits; provides guidance and assistance to less experienced auditors engaged in auditing taxpayer's books and records; translates audit functions/procedures into Spanish for taxpayers; contacts company officials, tax attorneys, or taxpayers' representatives to discuss purpose of and methods and procedures to be employed in making tax audits; confers with taxpayers or their representatives on tax audit issues and findings; serves as an expert witness at hearings or in court cases of protested liabilities or alleged criminal or civil violations; provides classroom and/or on-the-job training involving new or revised statutes, rules and regulations, IDOR policies and procedures and audit methods.</p>									
20%	<p>1. Travels to taxpayer's place of business to independently conduct highly complex Illinois and/or out-of-state computerized audit assignments of major corporations, large business organizations, multi-national corporations, unitary businesses, partnerships, fiduciary and individual taxpayers subject to all taxes administered by IDOR; determines proper audit methods, techniques and procedures to pursue in accomplishing audit, including means of verification, test methods and extent of testing. Multi-national corporation audits and unitary audits are inherently complex in that large amount of assets, property, payroll and computerized operations must be reviewed. Lifts and carries a personal computer and materials weighing up to 50 pounds.</p>									
20%	<p>2. Examines and analyzes records and accounts to determine compliance or non-compliance with tax rules, regulations and laws. Resolves questions of legality in the course of audits; has authority to require documents be presented to ensure full compliance including Income Tax records and other financial statements and documents. Researches statutes, letters, court rulings, court decisions and other resource material to ensure sound interpretation of each case as it applies to specific audit issues.</p>									
15%	<p>3. Serves as an auditor-in-charge, assigning, directing and reviewing the activities of an audit team engaged in conducting complex and large scale Illinois and out-of-state audits of major companies, partnerships and individual taxpayers; determines the most appropriate audit procedures; discusses with auditors the scope and procedures to be followed; makes preliminary analysis of taxpayer's accounting systems and records to determine most efficient and appropriate methods of obtaining information</p>									
DIRECTOR OF CMS SIGNATURE			IMMEDIATE SUPERVISOR SIGNATURE			AGENCY HEAD SIGNATURE			DATE	
<i>Janet Jorde</i> 39			<i>[Signature]</i> 31			<i>[Signature]</i>			04/02/2021	
			APR 05 2021							

BY: *[Signature]*

16. (CONTINUED)

% OF TIME

(continued) relative to tax liability. Provides direction to audit team staff in resolving complex or controversial accounting or audit issues. Interprets and clarifies specific sections of tax laws, rules and regulations applicable to given situations. Prepares or reviews completed computerized audit reports applicable to given situations and for legal compliance and certification of accuracy. Signs audit reports prepared by assigned staff incorporating any combination of the several tax acts as indicated.

- 10% 4. Provides guidance and assistance to less experienced auditors engaged in auditing taxpayer's books and records. Interprets and resolves technical problems in the course of the audit.
- 10% 5. Translates audit functions/procedures into Spanish for taxpayers and their representatives who cannot speak or read English.
- 05% 6. Contacts company officials, tax attorneys, or taxpayers' representatives to discuss purpose of and methods and procedures to be employed in making tax audits.
- 05% 7. Confers with taxpayers or their representatives on tax audit issues and findings. Arranges for and travels to taxpayers place of business to conduct post-audit conferences to present basis of audit results to taxpayers or their representatives; presents audit exhibits to substantiate accuracy of audits; prepares amended returns if overstated or understated liability is disclosed; endeavors to foster taxpayer's cooperation in agreeing to established liability, in signing amended returns and remitting additional taxes if audits reveal underpayments.

17. POSITION TITLE AND NUMBER OF IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

Revenue Audit Supervisor 38369-25-41-130-10-01, 15-01, 20-01, 25-01, 30-01, 35-01, 40-01, 45-01, 50-01, 55-01

WORKING TITLE (IF ANY)

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

SUPERVISOR OR LEAD WORKER

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted.

If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount:

Position Title	Position Number	No. of Incumbent or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. **NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION CAN NO LONGER BE USED.**

Requires a bachelor's degree in accounting, business administration, or finance, with a minimum of 21 semester hours of progressive coursework in accounting, and additional coursework in management and business administration, business law, computer science, economics and statistics. Requires two years of professional experience as a Revenue Auditor II. Requires extensive knowledge of methods and techniques of tax accounting and auditing. Requires extensive knowledge and understanding of the various types of records maintained by businesses, partnerships and individuals. Requires extensive knowledge of the various tax laws administered by IDOR. Requires extensive knowledge of methods, procedures and techniques utilized in the examination and review of tax returns and supporting documentation, and in determining and recommending appropriate corrective action. Requires extensive knowledge of files, procedural manuals and other related materials utilized in the research and analysis of tax returns and supporting documentation. Requires ability to independently undertake and complete highly complex audits of corporate, partnership and individual taxpayers. Requires ability to plan, organize and supervise the activities of an assigned team of revenue auditors engaged in performing complex tax audits. Requires ability to analyze and determine adequacy of audit reports, and to draw conclusions on which to base recommendations. Requires ability to recognize and determine violations of and noncompliance with the tax laws, rules and regulations, and to explain and interpret significant irregularities to taxpayers. Requires ability and willingness to travel extensively and frequently, often keeping irregular hours. Requires access to an automobile and possession of a valid driver's license for the operation of a motor vehicle. Requires ability to lift and carry materials weighing up to 50 pounds including transporting and utilizing a personal computer. Requires the ability to speak and write Spanish at a colloquial skill level.

POSITION DESCRIPTION

POSITION TITLE	POSITION NUMBER
Revenue Auditor III	38373-25-41-130-99-02
% OF TIME	16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS (Continued)
05%	8. Serves as an expert witness at hearings or in court cases of protested liabilities or alleged criminal or civil violations; presents exhibits and testifies as to the validity and accuracy of audits; works with Attorney General's Office to develop criminal or civil cases.
05%	9. Provides classroom and/or on-the-job training involving new or revised statutes, rules and regulations, IDOR policies and procedures and audit methods and techniques to enhance auditing skills and knowledge to Audit Bureau personnel when requested.
05%	10. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION									
NEW/REVISED POSITION		Revenue Tax Specialist I		29	SS		38571-25-82-110-51-02		
3. AGENCY			4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/ AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION									
NEW/REVISED POSITION			Taxpayer Services/Customer Service/Taxpayer Assistance		0	016	2	R	
10. SECTION		11. UNIT			12. TRANSACTION CODE		13. EFFECTIVE DATE		
EXISTING POSITION					<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION		02/16/2023		
NEW/REVISED POSITION		Chicago Field Services							
14. WORK LOCATION		15. BARGAINING/TERM CODE		RUTAN EXEMPT					
EXISTING POSITION									
NEW/REVISED POSITION		Cook County		RC062	N				
16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS									
25%	<p>1. Under general supervision, reviews, analyzes, evaluates and/or adjusts routine and involved original and amended tax returns, schedules and supporting documentation:</p> <ul style="list-style-type: none"> Analyzes and adjusts routine and highly technical original and amended tax returns, schedules, and supporting documentation, computer generated notices, correspondence, manual and automated account records, priority accounts, legislative referrals, disputed billings, reasonable cause requests, and other documents of increasing difficulty for compliance with tax laws, rules and regulations, mathematical, technical and procedural accuracy Makes factual and technical determinations and initiates manual or automated corrective, adjustment, edit and billing action to resolve discrepancies and deficiencies to allow the processing system to accept the return Executes priority adjustments and/or responds to priority referrals if adjustments cannot be completed based on statutes, rules, etc. Verifies account status and receipted payments to requesting parties Performs research on computer records, files and other resource material to determine nature of inquiry, e.g., filing requirements, account status information, billing problems, accounts receivable, interpretation of laws or rules, etc. Walks, stands, bends, reaches above shoulder level and lifts and carries tax documents weighing up to 25 pounds in performance of duties 								

	<ul style="list-style-type: none"> • Travels in the performance of duties.
20%	<p>2. Reviews and performs research on various source documents in providing information, guidance and assistance to Illinois and out-of-state taxpayers and/or their representatives, in writing and orally in English and Spanish of a routine and priority nature, relating to the various taxes administered by the Illinois Department of Revenue (IDOR):</p> <ul style="list-style-type: none"> • Provides information, assistance, and guidance on laws, rules and regulations, and policies and procedures as relates to all tax acts or IDOR programs • Assists taxpayers and/or their representatives in preparing registration forms, general, amended, supplemental and delinquent tax returns, including documents for individuals, partnerships, corporations, partnerships, estates, trusts and fiduciaries regarding account status, laws administered by IDOR, additional documentation or forms needed to resolve discrepancies answering technical inquiries and balances owed, etc. • Refers more difficult and complex cases to supervisor.
10%	<p>3. Independently performs research necessary to resolve discrepancies or deficiencies:</p> <ul style="list-style-type: none"> • Determines progressively difficult research methods necessary for resolution of discrepancies or deficiencies in order to adjust taxpayer accounts • Performs researches on all resources available to determine corrective action to be taken • Reconstructs taxpayer history • Performs research on historical documents, statutes and rules to determine validity and accuracy of returns and assessments.
10%	<p>4. Confers with taxpayers and/or their representatives to determine the nature of inquiries, problems or complaints:</p> <ul style="list-style-type: none"> • Approves or denies progressively difficult reasonable cause requests based on procedural and statutory guidelines • Utilizes the current tax operating systems to approve or deny abatement of penalties and/or interest • Requests additional information from taxpayers and/or their representatives in order to approve or deny reasonable cause • Performs increasingly difficult manual and/or automated mathematical calculations and procedures in computing tax liability and applicable penalty and interest, disallowed discounts or modifications, canceling all or portions of assessments and/or bills, and allocation of revenues in accordance with statutes outlining these processes • Explains computations and methods (not account specific) to taxpayers and/or their representatives in English and Spanish • Provides necessary forms to taxpayers • Informs taxpayers and their representatives in English and Spanish of the decision rendered.
10%	<p>5. Responsible for registering and maintaining business tax accounts:</p>


	<ul style="list-style-type: none"> • Reviews and analyzes routine and priority tax correspondence directed to the Customer Service Bureau from outside sources and IDOR officials to determine nature and content • Initiates corrective action to resolve inquiries.
10%	<p>6. Initiates correspondence to taxpayers and/or their representatives in English and Spanish on status of accounts and maintains and prepares required production and statistical records and reports:</p> <ul style="list-style-type: none"> • Initiates both written and oral communication in English and Spanish to taxpayers and their representatives regarding account status, laws administered by the IDOR, additional documentation or forms needed to resolve discrepancies, balances owed, etc. • Assists taxpayers, their representatives and others regarding laws administered by IDOR • Gives advice in English and Spanish regarding appropriate action to be taken to be in compliance • Prepares documentation to change tax liability, penalty and interest • Provides assistance and guidance in English and Spanish to taxpayers in the completion of all types of current, delinquent or amended returns, including all supporting documentation necessary to assist taxpayers and resolve discrepancies or deficiencies of a progressively difficult nature • Maintains a variety of production records, inventory records, reports, etc.
05%	<p>7. Will be assigned throughout the Customer Service Bureau to assist in higher level tax related duties as required, to serve on special project or test teams and will assist field auditors and collectors on a limited or as needed basis:</p> <ul style="list-style-type: none"> • Will be assigned to other areas of the Customer Service Bureau to assist in workload demands as part of the developmental phase • Serves as a member of special project or test teams • Assists field auditors and/or field collectors on a limited or as needed basis by providing information relative to status of accounts, filing status, etc. • Travels in the performance of these duties.
05%	<p>8. Receives advanced on-the-job training to enhance technical skills:</p> <ul style="list-style-type: none"> • Assists in training new and/or lower-level Bureau staff • Maintains a variety of daily production logs and document inventory records • As part of the developmental level, receives on-the-job training in processing non-routine and highly technical amended tax returns, schedules and supporting documentation, computer generated notices, correspondence, manual and automated account records, priority accounts, legislative referrals, disputed billings, reasonable cause requests and other documents of increasing difficulty for compliance with current tax laws, rules and regulations, mathematical, technical and procedural accuracy.
05%	<p>9. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)		
Public Service Administrator	37015-25-82-110-50-01	WORKING TITLE (IF ANY) Chicago Field Services Manager
18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:		
<input type="checkbox"/> Supervisor <input type="checkbox"/> Lead Worker		
NOTE: Supervisory or lead worker responsibilities <u>must</u> be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.		
Position Title	Position Number	No. of Incumbents or Funded Vacancies
19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.		
<u>Minimum Qualifications</u> <ol style="list-style-type: none"> 1. Requires a bachelor's degree and completion of the Revenue Tax Specialist Trainee Program -OR- Requires nine years of supportive tax-related experience, including completion of the Revenue Tax Specialist Trainee Program. 2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals. 		
<u>Preferred Qualifications (In Order of Significance)</u>		
20. CONDITIONS OF EMPLOYMENT		
<ol style="list-style-type: none"> 1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check. 2. Requires the ability to travel. 3. Requires the ability to walk, stand, bend, reach above shoulder level, and lift and carry tax documents weighing up to 25 pounds. 4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc. 		
21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is <u>NOT</u> intended to be all-encompassing or to address all responsibilities of the position.		
The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, thirteen holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).		

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Raven Del'Auguste by Stephen M. Johnson 2/21/2023</i>			02/21/2023

JL

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue Tax Specialist II				29	SS		38572-25-48-100-99-02		
3. AGENCY		4. BUREAU/DIVISION			5. EXMT CODE	6. WORK COUNTY	7. AI AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue		Collections			0	84	2	R	
10. SECTION		11. UNIT			12. TRANSACTION CODE			13. EFFECTIVE DATE	
EXISTING POSITION					<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			08/01/2022	
NEW/REVISED POSITION									
14. WORK LOCATION		15. BARGAINING/TERM CODE		RUTAN EXEMPT					
EXISTING POSITION									
NEW/REVISED POSITION									
Sangamon County		RC062		N					
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS								
20%	<p>1. Under general direction, receives, reviews and analyzes problematic, non-routine and highly technical in-state and out-of-state accounts assigned by the Gentax System, or referred from other enforcement programs and State Agencies, involving the various taxes and/or debt administered by the Illinois Department of Revenue (IDOR), to determine the most appropriate collection action to secure delinquent tax returns, debt payment and taxpayer compliance in a cost efficient manner, e.g., bank levy, wage levy, license revocation, etc.:</p> <ul style="list-style-type: none"> • Verifies taxpayer financial information via IDOR's tax systems • Analyzes, determines and documents adjustments required for all major tax systems • Initiates liens and monitors statutes • Issues bulk sales stop orders, files bankruptcy claims and analyzes Board of Appeal petitions • Performs a technical analysis of the tax returns, audit files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt • Performs an in-depth analysis of accounts being reviewed for specific enforcement actions • Accesses the case in Gentax and documents all pertinent information • Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period 								

	<ul style="list-style-type: none"> • Reschedules or transfers the case, as necessary • Lifts and carries tubs containing tax documents weighing up to 25 pounds.
20%	<p>2. Writes and speaks English and Spanish to confers by telephone, correspondence and or in person with taxpayers, their representatives and/or others to make demand for payment of taxes or debt, or filing of missing returns:</p> <ul style="list-style-type: none"> • Provides technical assistance or guidance in preparing tax returns or resolving inquiries or complaints dealing with highly technical tax issues, tax laws, rules and regulations • Explains issues, court decisions, tax laws and IDOR's position with respect to the account • Sets up and attends meetings with taxpayers located in-state and out-of-state.
20%	<p>3. Utilizes Gentax, or other PC systems, to access delinquent taxpayer cases:</p> <ul style="list-style-type: none"> • Reviews and analyzes on-line information to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case • Analyzes the on-line information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action; takes the appropriate action, (i.e., collect in full, recommend adjustment or suspense) • Takes enforcement action as required, (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.) • Records in the applicable system any action taken by using comments • Obtains and documents financial, asset, secondary or other information regarding a taxpayer case • Utilizes Gentax to reschedule the case • Generates correspondence, by selecting the assessment and delinquency detail, and any variable information needed to construct the document • On taxpayer initiated contacts, accesses the case in Gentax, analyzes the case as documented above • Determines where the case is residing and understands the type of action being taken by that location • Takes and recommends the appropriate collection action; assists taxpayer inquiries.
10%	<p>4. Recommends various courses of action:</p> <ul style="list-style-type: none"> • Determines responsibility and issues penalties, transfer corporate debt to responsible officers • Determines extension of time for tax payments and closing of cases determined to be un-collectible • Recommends disposition of cases supported by documented information and evidence • Compiles and prepares protest packages to support IDOR hearings.
10%	<p>5. Provides assistance to lower level Revenue Tax Specialists and Trainees performing similar but less complicated work:</p>

	<ul style="list-style-type: none"> • Participates in the training of new employees on the various taxes, Gentax and the operations of the Program Area • Makes recommendations to revise operating procedures when applicable.
05%	<p>6. Participates in staff meetings:</p> <ul style="list-style-type: none"> • Assists supervisor in the development of new and/or revised operating policies and procedures, staffing requirements, work schedules, etc., recommending changes in procedures to expedite workflow, etc., and implements changes upon approval by management.
05%	<p>7. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems:</p> <ul style="list-style-type: none"> • Assists in writing processing methods and procedures.
05%	<p>8. Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.</p>
05%	<p>9. Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

WORKING TITLE (IF ANY)

Public Service Administrator	37015-25-48-210-00-01
Public Service Administrator	37015-25-48-220-00-01
Public Service Administrator	37015-25-48-220-10-01
Public Service Administrator	37015-25-48-240-00-01
Public Service Administrator	37015-25-48-245-00-01
Public Service Administrator	37015-25-48-260-00-01
Public Service Administrator	37015-25-48-270-00-01
Public Service Administrator	37015-25-48-280-00-01
Public Service Administrator	37015-25-48-290-00-01
Public Service Administrator	37015-25-48-291-00-01
Public Service Administrator	37015-25-48-292-00-01
Public Service Administrator	37015-25-48-293-00-01
Public Service Administrator	37015-25-48-294-00-01
Public Service Administrator	37015-25-48-300-00-01
Public Service Administrator	37015-25-48-310-00-01
Public Service Administrator	37015-25-48-330-00-01

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

Supervisor Lead Worker

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

- Minimum Qualifications
1. Requires a bachelor's degree.
 2. Requires four years' supportive tax related experience, including completion of the Revenue Tax Specialist Trainee Program, and three years as a Revenue Tax Specialist I.
 3. -OR- Requires twelve years' supportive tax related experience, including completion of the Revenue Tax Specialist Trainee Program, and three years as a Revenue Tax Specialist I.
 4. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.
- Preferred Qualifications (In Order of Significance)
- 1.

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a fingerprint-based background check and tax clearance.
2. Requires ability to lift and carry up to 25 pounds.



21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, twelve holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

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IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
	9/1/2022		08/12/2022

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION									
NEW/REVISED POSITION				29	SS		38571-25-48-570-01-02		
3. AGENCY		4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH	8. AUDIT	9. OFFICE USE	
EXISTING POSITION									
NEW/REVISED POSITION		Collections/Field Compliance							
Revenue		Collections / Field Compliance Division		0	016	2	R		
10. SECTION		11. UNIT		12. TRANSACTION CODE			13. EFFECTIVE DATE		
EXISTING POSITION				<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			09/16/2022		
NEW/REVISED POSITION		Chicago Field Compliance							
14. WORK LOCATION		15. BARGAINING/TERM CODE		RUTAN EXEMPT					
EXISTING POSITION									
NEW/REVISED POSITION		Cook County		RC062		N			
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS								
25%	<p>1. Under general supervision, confers by telephone, correspondence and/or in person with Spanish and English speaking taxpayers and/or their representatives to make demand for payment or filing of missing returns and/or debt:</p> <ul style="list-style-type: none"> Provides assistance, guidance in preparing tax returns, and resolving inquiries and complaints from Spanish and English speaking stakeholders dealing with routine tax issues, tax laws, rules and regulations Explains to Spanish and English speaking stakeholders issues, court decisions, tax laws and the Illinois Department of Revenue's (IDOR's) position with respect to accounts in question Ascertains the status of accounts and independently explains IDOR's actions, policies and requirements to taxpayers or their representatives Sets up and attends meetings with taxpayers in the district office. 								
20%	<p>2. Receives, reviews and analyzes routine in-state and out-of-state accounts assigned by the tax system, referred from other enforcement programs or other state agencies, involving the various taxes administered by the IDOR, to determine the most appropriate collection action to secure delinquent tax returns, taxpayer compliance and taxpayer debt in a cost-efficient manner, e.g., bank levy, wage levy, license revocations, etc.:</p> <ul style="list-style-type: none"> Verifies taxpayer financial information via the IDOR's tax systems 								

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Analyzes, determines and documents adjustments required • Recommends liens if applicable • Monitors statuses as needed to ensure proper procedures are being followed • Performs routine analysis of the tax returns, files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt • Performs routine and involved analysis of accounts being reviewed for specific enforcement actions • Accesses cases in IDOR Tax System and documents all pertinent information relative to the collection case • Lifts and carries tubs containing tax documents weighing up to 25 lbs.
20%	<p>3. Utilizes GenTax, or other IDOR systems, to access delinquent taxpayer cases while conferring by telephone, correspondence, and/or in person:</p> <ul style="list-style-type: none"> • Reviews and analyzes IDOR Tax System and/or other applications available to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case • Analyzes information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action • Takes enforcement action as required (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.) • Records in the applicable system any action taken by using comments • Obtains and documents financial, asset, secondary or other information regarding a taxpayer case • Utilizes GenTax to reschedule cases • Generates correspondence in Spanish or English by selecting the assessment and delinquency detail, and any variable information needed to construct the document desired • Identifies the location of the collection case in the tax system and interprets the collection efforts being taken in order to assist the taxpayer • Takes the appropriate collection action necessary for tax compliance.
05%	<p>4. Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period:</p> <ul style="list-style-type: none"> • Reschedules or transfers the case accordingly to the applicable collection enforcement area or Supervisor as needed.
05%	<p>5. Recommends various courses of action to taxpayers, higher level staff, and managers in order to resolve collection cases:</p> <ul style="list-style-type: none"> • Determines responsibility and issues penalties • Recommends transfer of corporate debt to responsible officers

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS	
	<ul style="list-style-type: none"> Determines extension of time for tax payments and closing of cases determined to be un-collectible Recommends disposition of cases supported by documented information and evidence. 	
05%	6. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems: <ul style="list-style-type: none"> Provides input during the development of new or revised tax forms and other tax related material. 	
05%	7. Confers with supervisor relative to new or revisions in tax laws and other regulatory material.	
05%	8. Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.	
05%	9. As part of an on-the-job learning process, assists in processing the more difficult/complex tax account cases.	
05%	10. Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.	
17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)		
		WORKING TITLE (IF ANY)
Public Service Administrator		37015-25-48-570-00-01
18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:		
<input type="checkbox"/> Supervisor <input type="checkbox"/> Lead Worker		
NOTE: Supervisory or lead worker responsibilities <u>must</u> be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.		
Position Title	Position Number	No. of Incumbents or Funded Vacancies
19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.		
<u>Minimum Qualifications</u> <ol style="list-style-type: none"> Requires a bachelor's degree and Requires completion of the Revenue Tax Specialist Trainee program -OR- Requires nine years' Department of Revenue experience, including completion of the Revenue Tax Specialist Trainee program. Requires ability to speak and write in Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals. 		
<u>Preferred Qualifications (In Order of Significance)</u>		

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to lift and carry up to 25 pounds.


21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, twelve holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Anthony Pascente by Lindsay Vogel</i> 10/24/2022			09/19/2022



ILLINOIS DEPARTMENT OF
CENTRAL MANAGEMENT SERVICES

POSITION DESCRIPTION

1. POSITION TITLE		WORKING TITLE (IF ANY)		Bilingual Code	Position Title Option Code	2. POSITION NUMBER				
Existing Position										
New/Revised Position				29	SS	38403-25-48-510-10-02				
3. AGENCY			4. BUREAU/ DIVISION			5. EXMT CODE	6. WORK COUNTY	7. AUTH	8. AUDIT	9. OFFICE USE
Existing Position										
New/Revised Position			Collections/Field Compliance Division			0	016	2	R	
10. SECTION			11. UNIT			12. TRANSACTION CODE		13. EFFECTIVE DATE		
Existing Position								04/01/2020		
New/Revised Position										
District #13						<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MC022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION				
14. WORK LOCATION		15. BARGAINING/TERM CODE		Rutan Exempt						
Existing Position										
New/Revised Position		Cook County <i>direction</i>		RC062	N					
% OF TIME	16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS									
	<p>Under general supervision, as a senior level collection officer with responsibility for an assigned District Office, serves as a designated officer in charge of the Retailers' Occupation Tax Revocation Program and Seizure Program; conducts special investigations of a sensitive nature; serves as training officer for lower level collectors; serves as officer in charge during large special events requiring training and direction of lower level collectors; in absence of supervisor, or at supervisor's request, reviews, approves or disapproves field collectors progress; attends and participates in District and Regional Office meetings; conducts, reviews and/or participates in field tax collection assignments to English and Spanish speaking taxpayers within a specific geographic area and assists in resolving backlogs in other geographic areas; assists supervisor with a variety of administrative related District Office duties; travels in the performance of duties.</p>									
15%	1. Serves as designated officer in charge of the Retailers' Occupation Tax Revocation Program. Prepares and serves ten day letters of demand, notices of hearing, and notice of decision. Schedules formalized Department hearings and gives sworn testimony at hearings. Recommends appropriate courses of action if the taxpayer has not been brought into compliance. Travels to taxpayer's place of business to serve compliance documents.									
15%	2. Serves as designated officer in charge of the Seizure Program. Prepares and serves ten day letters of demand, tax liens, seizure warrants and releases of tax liens and seized property to English and Spanish speaking taxpayers. Travels to taxpayer's place of business to serve such documents. Recommends the appropriate course of action if the seizure fails to satisfy the assessed liability. Serves as liaison officer between the Department of Revenue and the local sheriff's office. Coordinates seizures with the Illinois State Police and liquidator of seized property to verify that the sale is accomplished.									
15%	3. Conducts special investigations of a sensitive nature, e.g. governmental officials believed to be delinquent in tax monies owed the state or special requests from higher level management, necessitating detailed reports of procedures followed or conclusions so the Department's findings will not be repudiated. Travels to taxpayer's business for the collection of delinquent taxes, securing delinquent tax returns and determining taxpayer compliance to various tax laws.									
DIRECTOR OF CMS SIGNATURE			IMMEDIATE SUPERVISOR SIGNATURE			AGENCY HEAD SIGNATURE			DATE	
<i>Janel Jorde</i> 39			CENTRAL MGMT SERVICES BUREAU OF PERSONNEL			<i>[Signature]</i>			6/30/2020	

CMS-104 (Rev. 10/94) IL 401-0794

D. Shedd 7/1/20 *Shane Tappert 7/1/20*

JUL 01 REC'D

TECHNICAL SERVICES

16. (CONTINUED)		
% OF TIME	16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS	
15%	4. Serves as training officer for lower level collectors; participates in on the job training programs designed to provide lower level collectors with instructions on tax laws, agency rules and regulations, report preparation, work procedures and methods and collection techniques. As part of the training program, conducts on-site collection assignments in order to provide new collectors with work experience in applying the skills and knowledge's acquired during the classroom training period. Monitors the training and progress of new employees and frequently provides advice and assistance on the successful completion of assignments. Provides input in evaluating new employees during and at the completion of their training period. Serves as officer in charge during large special events requiring training and direction of lower level collectors.	
10%	5. In absence of supervisor, or at supervisors request, reviews, approves or disapproves field collectors progress; reviews progress and final collection reports for completeness and adequacy of data, e.g., total amount of money collected is correct, supporting documents and evidence are consistent and complete, accuracy of final payment plans, recommended disposition of cases are in good order, etc. Approves or disapproves final reports and/or forwards questionable cases wherein the disposition of case may not be clear to supervisor, and forwards all recommendations for closing of cases when further collection activity would be futile or costly to the Department to supervisor for final decision. Confers with lower level collectors and advises them of errors made and recommends the proper course of action to correct reports. In absence of supervisor, or at supervisor's request, review daily field reports for accuracy of information, e.g., mileage, meals, lodging, parking fees, etc. Approves daily field reports before vouchers for reimbursements are prepared.	
10%	6. Attends and participates in District and Regional Office meetings; assists in planning, developing and implementing new or revised methods, procedures, standards, and techniques; appries District Office staff of new or revised statutes and other programs mandated by legislature; identifies training needs of field staff and participates in formal training programs.	
17. POSITION TITLE AND NUMBER OF IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)		
Public Service Administrator	37015-25-48-510-00-01	WORKING TITLE (IF ANY)
18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:		
<input type="checkbox"/> SUPERVISOR OR <input type="checkbox"/> LEAD WORKER		
NOTE: Supervisory or lead worker responsibilities <u>must</u> be described in a detailed duty statement(s) with a time percentage(s) allotted.		
If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount:		
Position Title	Position Number	No. of Incumbent or Funded Vacancies
As Collection Officer in Charge:		
Revenue Collection Officer II	38402-25-48-510-10-02	2
Revenue Collection Officer I	38401-25-48-510-10-02	2
Revenue Collection officer Trainee	38405-25-48-510-10-02	2
19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.		
Requires knowledge, skill and mental development equivalent to completion of four years of college and four of years professional experience in the delinquent tax collection field including two years of experience as a Revenue Collection Officer II. Requires extensive knowledge of various tax laws, rules and regulations, court decisions and other legal opinions applicable to the collection program. Requires extensive knowledge of tax collection methods and techniques. Requires working knowledge of accounting practices, methods, and procedures. Requires working knowledge of administrative techniques and practices utilized in staff management and organization. Requires ability to independently conduct collection assignments, exercising sound judgment and discretion in analyzing and evaluating facts and evidence. Requires ability to apply tax laws, rules and regulations appropriate to collection situations. Requires a valid driver's license and/or the ability to travel, often keeping irregular hours in the conduct of collection activities. Requires the ability to read and speak Spanish at a colloquial level.		

16. (CONTINUED) Revenue Collection Officer III		38403-25-48-510-10-02
% OF TIME	16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS	
10%	7. Conducts, reviews and/or participates in field tax collection assignments to English and Spanish speaking taxpayers within a specific geographic area and assists in resolving backlogs in other geographic areas; makes personal calls in high risk areas on taxpayers who are antagonistic, potentially dangerous, under extreme emotional distress, and recalcitrant tax evaders; collects and assists other staff in collecting delinquent taxes when the lower level collector is unable to collect; serves as part of a collection team when the use of additional personnel is warranted, e.g., performing withholding tax audits when unable to obtain unfiled tax returns from corporations, partnerships and individual taxpayers, inspecting coin operated amusement devices for current licenses, etc. Participates in high profile compliance procedures, e.g., seizures, weigh station surveys and canvassing, which may involve media coverage. Travels in the performance of duties.	
05%	8. In absence of supervisor, or at supervisors request, assists in a variety of administrative duties, e.g., conducts special studies of operations and compiles and prepares recommendations for changes in procedures to facilitate work in the office; compiles and prepares special production, activity and statistical reports.	
05%	9. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.	

1. POSITION TITLE		WORKING TITLE (IF ANY)	BILINGUAL CODE	POSITION TITLE OPTION CODE	2. POSITION NUMBER			
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue Tax Specialist III			29	SS	38573-25-82-110-51-02			
3. AGENCY		4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. AI AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION								
NEW/REVISED POSITION		Taxpayer Services/Taxpayer Assistance		0	016	2	R	
10. SECTION		11. UNIT		12. TRANSACTION CODE		13. EFFECTIVE DATE		
EXISTING POSITION				<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION		11/01/2021		
NEW/REVISED POSITION		Chicago Field Services						
14. WORK LOCATION		15. BARGAINING/TERM CODE		RUTAN EXEMPT				
EXISTING POSITION								
NEW/REVISED POSITION		Cook County		RC062		N		
% OF TIME		16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS						
20%		<p>1. Under general direction, serves as an advanced technical specialist involving highly technical, analytical, procedural or legal application of tax laws administered by the Illinois Department of Revenue (IDOR) and provides outreach to the public and responses to highly technical, complex issues or legal questions to management staff, and/or the public:</p> <ul style="list-style-type: none"> • Performs in-depth and extensive research and analysis of the most complex or sensitive tax issues • Confers with taxpayers, their representatives and others by telephone, email and other correspondence, explaining tax regulations, requirements, policies and procedures • Interprets the application of laws administered by the IDOR, court decisions and opinions as they relate to specific issues and questions posed • Verifies adequate reporting methods, theory, complex mathematical, legal and procedural errors and determines type of research needed for resolution • Compiles documentation to support answers, adjustment actions, etc. • Develops outreach presentations on highly technical and complex issues relating to procedures or legal application of tax laws administered by the IDOR, attends and presents at outreach events • Travels in the performance of these duties. 						

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
20%	<p>2. Develops, reviews and revises operating procedures and manuals; develops and executes training programs relating to systems, technical tax issues, processing procedures, statutory changes and on the job training:</p> <ul style="list-style-type: none"> • Develops, reviews and revises operating and procedural manuals, determining which existing procedures need to be updated and/or revised • Writes new procedures for new functions, statutory changes, etc. • Develops, executes and instructs training classes relating to systematic logic, technical tax issues, refresher courses, statutory changes, processing procedures, system changes, etc. • Conducts studies of training needs • Develops training programs for lower level staff to provide skill necessary to perform increasingly complex work to include an in-depth knowledge of the GenTax system and the ability to teach it to others • Enters and checks batches for the GenTax system • Trains supervisory staff on technical changes • Develops means by which to determine if training was adequate or successful develops means by which to determine if training was adequate or successful • Provides on-the-job training to lower staff level tax specialists staff and trainees.
20%	<p>3. Interacts activities with other work areas for testing and projects as directed by higher level staff:</p> <ul style="list-style-type: none"> • Serves as lead analyst providing direction and assistance to same or lower level staff • Confers with staff to resolve cases of a unique or questionable nature or by providing interface with irate taxpayers • Apprises staff of and explains changes in policies and procedures • Serves as a technical consultant to both lower and upper level staff providing guidance and assistance in resolving complex processing and/or procedural problems • Provides responses to technical, highly complex, sensitive and legal questions to various areas on the IDOR and the public. • Participates in specific technical tax projects as directed by higher level staff • Translates functions/procedures into Spanish for individuals who cannot speak or read English, in contacts with the general public, advocacy groups, taxpayers and community organizations • Participates in special project and test teams or serves as lead member as requested • Compiles reports of new processing technologies and systemic changes, workflow problems, questionable analysis methods, etc. • Provides technical assistance to Division staff during the development of tax returns, schedules, instructions, etc. • Travel in the performance of these duties.
10%	<p>4. Maintains quality and production work measurement records; develops quality review procedures and processes:</p> <ul style="list-style-type: none"> • Develops quality review procedures and processes

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Trains supervisors and lower level staff on theories and application of quality review • Maintains quality review records • Suggests changes in percentage of completed work reviewed based upon errors found, etc. • Resolves conflicts that arise when the definition of "error" is not readily apparent to processing and supervisory staff • Completes daily batching of GenTax.
10%	<p>5. Analyzes various forms and supporting documentation to determine compliance with statutes and IDOR policy, to detect deficiencies and resolve discrepancies:</p> <ul style="list-style-type: none"> • Analyzes various tax forms of one or more tax types to include but not limited to, Sales Tax, Income Tax, Withholding Tax, Business Tax, Use & Service Tax, supporting documentation and any other documentation to determine compliance with statutes and policies, detect deficiencies, resolve discrepancies, etc., while verifying mathematical, technical and legal accuracy of returns processed and/or adjustments performed • Reviews, resolves and adjusts complex and/or sensitive situation accounts; corrects and/or initiates adjustments when errors are detected • Recommends to supervisory and lower level staff appropriate corrective action based on statutes, departmental policies, procedures, precedents and court decisions • Keeps management apprised of processing, statutory or procedural problems encountered • Recommends solutions to resolve complex tax questions or problems encountered to include but not to be limited to Sales Tax, Income Tax, Withholding Tax, Business Tax, Use & Service Occupation Tax addressing benefits and detriments resulting from proposed recommendations.
10%	<p>6. Monitors pending legislation, developing impact statements; interacts activities with other work areas; participates in or serves as a lead member on test teams:</p> <ul style="list-style-type: none"> • Provides technical and consultative services to Division staff, other governmental agencies, taxpayers, their representatives and others by interpreting established or amended statutes, departmental rules and regulations, etc., to resolve highly complex, sensitive or technical tax issues to verify compliance with statutes, rules, regulations, etc. • Monitors pending legislation, preparing impact statements and recommendations for changes to proposed legislation • Develops new legislative proposals for consideration by the General Assembly, citing benefits to the Department and/or taxpayers, processing areas, fiscal impact, administrative impact, etc. • Informs all employees of statutory changes • Assists with implementation of new legislation. • Coordinates work, technical issues, etc., with other areas of the Agency to resolve procedural conflicts, request information assistance, etc. • Monitors pending systemic change requests.

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS	
05%	7. Confers with taxpayers, their representatives and others providing information in technical and lay terms depending on technical tax knowledge of the taxpayer: <ul style="list-style-type: none"> • Responds to correspondence via email and other methods of communication • Communicates in Spanish to those individuals who do not read or speak English. 	
05%	8. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.	
17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)		
		WORKING TITLE (IF ANY)
Public Service Administrator	37015-25-82-110-50-01	Chicago Field Services Manager
18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:		
<input type="checkbox"/> Supervisor <input type="checkbox"/> Lead Worker		
NOTE: Supervisory or lead worker responsibilities <u>must</u> be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.		
Position Title	Position Number	No. of Incumbents or Funded Vacancies
19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.		
<u>Minimum Qualifications</u>		
1. Requires a Bachelor's degree. 2. Requires seven years supportive tax related experience, including completion of the Revenue Tax Specialist Trainee program and three years as a Revenue Tax Specialist II. 3. -OR- Requires fifteen years of supportive tax related experience, including completion of the Revenue Tax Specialist Trainee Program and three years as a Revenue Tax Specialist II. 4. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.		
<u>Knowledge, Skills, and Abilities</u>		
1. Requires extensive knowledge of current Illinois and Federal tax laws, rules and regulations and out-of-state tax filing requirements. 2. Requires thorough knowledge of files, procedural manuals and other materials utilized in the research and analysis of tax returns and supporting documents. 3. Requires extensive knowledge of tax accounting theory, principal and practices. 4. Requires extensive knowledge of computer systems as related to processing of various tax information. 5. Requires extensive knowledge of manual and automated office equipment.		

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

- 6. Requires extensive knowledge of public relations principles and practices.
- 7. Requires ability to detect non-compliance with Illinois State tax laws and regulations.
- 8. Requires ability to detect computational, legal and/or technical errors in the process of analyzing tax returns and supporting documentation.

20. CONDITIONS OF EMPLOYMENT

- 1. Requires the ability to successfully complete a fingerprint-based background check and tax.
- 2. Requires the ability to travel.

21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

The Illinois Department of Revenue is seeking to hire a Revenue Tax Specialist III for the Taxpayer Assistance Northern Field Services office in Chicago. This successful candidate will be the technical advisor to the staff, manager and the public on highly technical, analytical, procedural or legal application of tax laws administered by the IDOR. Other duties include monitoring pending legislation and its impact on systems, forms and procedures as well as developing and delivering training to staff, management and the public. The successful candidate will be able to speak, read and write Spanish fluently.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, twelve holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Jared Seede</i> <i>by D. Short</i> 11/9/21		<i>[Signature]</i>	11/09/2021

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue Tax Specialist I				29	SS		38571-25-48-100-99-02		
3. AGENCY			4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue			Collections		0	084	2	R	
10. SECTION			11. UNIT		12. TRANSACTION CODE			13. EFFECTIVE DATE	
EXISTING POSITION					<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			07/01/2022	
NEW/REVISED POSITION									
14. WORK LOCATION			15. BARGAINING/TERM CODE		RUTAN EXEMPT				
EXISTING POSITION									
NEW/REVISED POSITION									
Sangamon County			RC062		N				
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS								
25%	1. Under general supervision, confers by telephone, correspondence and/or in person; in English and/or Spanish, with taxpayers and/or their representatives to make demand for payment or filing of missing returns and/or debt: <ul style="list-style-type: none"> • Provides assistance, guidance in preparing tax returns, and resolving inquiries and complaints from stakeholders dealing with routine tax issues, tax laws, rules and regulations • Explains issues, court decisions, tax laws and the Illinois Department of Revenue's (IDOR's) position with respect to accounts in question • Ascertains the status of accounts and independently explains IDOR's actions, policies and requirements to taxpayers or their representatives • Sets up and attends meetings with taxpayers located in-state and out-of-state. 								
20%	2. Receives, reviews and analyzes routine in-state and out-of-state accounts assigned by the tax system, referred from other enforcement programs or other state agencies, involving the various taxes administered by the Illinois Department of Revenue (IDOR), to determine the most appropriate collection action to secure delinquent tax returns, taxpayer compliance and taxpayer debt in a cost-efficient manner, e.g., bank levy, wage levy, license revocations, etc.:								

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Verifies taxpayer financial information via the IDOR's tax systems • Analyzes, determines and documents adjustments required • Initiates liens if applicable • Monitors statuses as needed to ensure proper procedures are being followed • Notifies taxpayers of tax liability with bulk sales stop orders • Files bankruptcy claims with the applicable court to indicate amount of debt owed by the debtor • Performs routine analysis of the tax returns, files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt • Performs routine and involved analysis of accounts being reviewed for specific enforcement actions • Accesses cases in IDOR Tax System and documents all pertinent information relative to the collection case • Lifts and carries tubs containing tax documents weighing up to 25 lbs.
20%	<p>3. Utilizes Gentax, or other PC systems, to access delinquent taxpayer cases while conferring by telephone, correspondence, and/or in person:</p> <ul style="list-style-type: none"> • Reviews and analyzes IDOR Tax System and/or other applications available to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case • Analyzes information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action • Takes enforcement action as required (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.) • Records in the applicable system any action taken by using comments • Obtains and documents financial, asset, secondary or other information regarding a taxpayer case • Utilizes Gentax to reschedule cases • Generates correspondence, by selecting the assessment and delinquency detail, and any variable information needed to construct the document desired • Identifies the location of the collection case in the tax system and interprets the collection efforts being taken in order to assist the taxpayer • Takes the appropriate collection action necessary for tax compliance.
05%	<p>4. Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period:</p> <ul style="list-style-type: none"> • Reschedules or transfers the case accordingly to the applicable collection enforcement area or Supervisor as needed.
05%	<p>5. Recommends various courses of action; in English and/or Spanish, to taxpayers, higher level staff, and managers in order to resolve collection cases:</p>

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS	
	<ul style="list-style-type: none"> • Determines responsibility and issues penalties • Recommends transfer of corporate debt to responsible officers • Determines extension of time for tax payments and closing of cases determined to be un-collectible • Recommends disposition of cases supported by documented information and evidence • Compiles and prepares protest packages to support-department hearings. 	
05%	6. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems: <ul style="list-style-type: none"> • Provides input during the development of new or revised tax forms and other tax related material. 	
05%	7. Confers with supervisor relative to new or revisions in tax laws and other regulatory material.	
05%	8. Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.	
05%	9. As part of an on-the-job learning process, assists in processing the more difficult/complex tax account cases.	
05%	10. Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.	
17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)		
		WORKING TITLE (IF ANY)
Public Service Administrator	37015-25-48-210-00-01	
Public Service Administrator	37015-25-48-220-00-01	
Public Service Administrator	37015-25-48-220-10-01	
Public Service Administrator	37015-25-48-240-00-01	
Public Service Administrator	37015-25-48-245-00-01	
Public Service Administrator	37015-25-48-260-00-01	
Public Service Administrator	37015-25-48-270-00-01	
Public Service Administrator	37015-25-48-280-00-01	
Public Service Administrator	37015-25-48-290-00-01	
Public Service Administrator	37015-25-48-291-00-01	
Public Service Administrator	37015-25-48-292-00-01	
Public Service Administrator	37015-25-48-293-00-01	
Public Service Administrator	37015-25-48-294-00-01	
Public Service Administrator	37015-25-48-300-00-01	
Public Service Administrator	37015-25-48-310-00-01	
Public Service Administrator	37015-25-48-330-00-01	

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

- Supervisor Lead Worker

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires a bachelor's degree and Requires completion of the Revenue Tax Specialist Trainee program -OR- Requires nine years' Department of Revenue experience, including completion of the Revenue Tax Specialist Trainee program.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

- 1.

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to lift and carry up to 25 pounds.

21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.


The Illinois Department of Revenue is seeking to hire Revenue Tax Specialist's for the Springfield Collections Enforcement Division. These positions will receive supervised instruction and on-the-job training in the performance of all phases of the manual and automated collection process, account adjustment and billing, taxpayer registration, and taxpayer information. These positions will accept and complete assignments of increasing difficulty for the purpose of gaining experience and developing skills to collect delinquent tax liabilities and returns, interprets tax laws, assist taxpayers by telephone and in person, adjust accounts, register taxpayers, compute penalty and interest, and other routine and recurring functions relative to tax collecting and processing work assignments.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, twelve holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Anthony Pascente</i> <i>John H. Hild</i> 9/6/2022			07/15/2022



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1. POSITION TITLE		WORKING TITLE (IF ANY)		Bilingual Code	Position Title Option Code	2. POSITION NUMBER				
Existing Position		DEC 14 2012				38573-25-01-100-99-02				
New/Revised Position		A & R SHARED SERVICES CENTER		29	SS	38573-25-01-110-11-02				
3. AGENCY		4. BUREAU/DIVISION				5. EXMT CODE	6. WORK COUNTY	7. AR AUTH.	8. AUDIT	9. OFFICE USE
Existing Position										
New/Revised Position		Board of Appeals Office				0	016	Y	R	
10. SECTION		11. UNIT				12. TRANSACTION CODE		13. EFFECTIVE DATE		
Existing Position								11/01/12		
New/Revised Position										
14. WORK LOCATION		15. BARGAINING/TERM CODE		Rutan Exempt		<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MC022 EXEMPT CODE CHANGE <input checked="" type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input checked="" type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION				
Existing Position										
New/Revised Position		RC062		N						
Cook										
% OF TIME		16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS								

Under general direction, serves as an advanced specialist in resolving technical, legal or procedural issues concerning all taxes administered by the Department of Revenue or debts referred to Department of Revenue for collection from other state agencies; as a Hispanic foreign language translator, speaks and writes Spanish fluently in order to confer with Hispanic taxpayers, their representatives and others to resolve tax issues within the Chicago Division; performs in-depth collection duties of a highly specialized nature involving the review and analysis of the most complex, sensitive and priority in-state and out-of-state tax accounts referred to the various enforcement programs to ascertain the status of the account, and to determine and perform the appropriate collection or enforcement actions to secure payment of past due liabilities and non-filed returns; analyzes the mainframe tax systems; determines the total account balance and computes interest on all types of taxes for collection purposes; confers with taxpayers and their representatives providing information in technical or lay terms depending upon tax knowledge of taxpayer and to recommend various courses of action; schedules and appears as a witness in hearings or in court to provide testimony on behalf of the department; controls and monitors quality control within specific enforcement programs; provides technical assistance to lower level staff; accesses, analyzes and collects taxpayer cases in GenTax or in related PC systems; compiles and prepares a variety of weekly, monthly and special reports; participates in special project assignments; participates in agency training programs.

25%

1. Receives, reviews and analyzes problematic, complex, technical, sensitive and/or high priority in-state and out-of-state accounts assigned to the GenTax and accounts referred from other enforcement programs involving the various taxes administered by the Department to determine the most appropriate collection action to secure delinquent tax returns and taxpayer compliance in a cost efficient manner, e.g., bank levy, license revocation, etc.; verify taxpayer financial information via the main frame systems; analyzes, determines, and documents adjustments required for all major tax systems and debts referred from other state agencies to resolve and/or amend current debt reflected; initiates liens and monitors statuses; issues bulk sales stop orders and files bankruptcy claims, analyzes Board of Appeal petitions; perfects and approves 60-day referrals; compiles and prepares Suspense reports and manual reconciliation reports; reviews the Bankruptcy report; perfects LT98 batches prior to mailing; carries tubs containing tax documentation weighing up to 25 pounds; performs an in-depth analysis of accounts being reviewed for specific enforcement actions; accesses the case in GenTax and documents all pertinent information. Prepares and prints remittance processing documents when appropriate and directs the liability to the proper account period; re-schedules or transfers the case as necessary.

DIRECTOR OF CMS SIGNATURE <i>Jaime Belhard</i> 21 12-10-12	IMMEDIATE SUPERVISOR SIGNATURE <i>Brian Hamer</i>	AGENCY HEAD SIGNATURE <i>MB Westchours</i>	DATE 11/20/12
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CMS-104 (Rev. 10/94)

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By

16. (CONTINUED)	
% OF TIME	
15%	2. As the Division's Hispanic foreign language translator, confers by telephone, correspondence, and in person with taxpayers, their representatives and/or others to make demand for payment or filing of missing returns; provides technical assistance or guidance in preparing tax returns or resolving inquiries or complaints dealing with complex or sensitive tax issues, tax laws, rules and regulations; explains issues, court decisions, tax laws and the Agency's position with respect to the account. Sets up and attends conferences with taxpayers located in-state and out-of-state.
15%	3. Using the GenTax or other PC systems, accesses delinquent taxpayer cases; reviews and analyzes on-line information to determine the nature of the delinquencies and and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation, or any transactions that have changed the status of the case; analyzes the on-line information to determine the collection action that needs to be taken; such as phone contact, correspondence, research or other collection action; takes the appropriate action, i.e., collect in full, recommend adjustment or suspense, etc.; takes enforcement action as required, e.g., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.; records any action taken, using action codes and/or comments. Where necessary, obtains and documents financial, asset, secondary or other information regarding a taxpayer case. On taxpayer initiated contacts, accesses the case in GenTax, analyzes the case as documented above; determines where the case is residing and understands the type of action being taken by that location; takes or recommends the appropriate collection action.

17. POSITION TITLE AND NUMBER OF IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

	WORKING TITLE (IF ANY)
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Public Service Administrator 37015-25-01-110-00-01

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

SUPERVISOR OR LEAD WORKER

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted.

If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount:

Position Title	Position Number	No. of Incumbent or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. **NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.**

Requires a Bachelor's degree and seven years supportive tax related experience, including completion of the Revenue Tax Specialist Trainee program and three years as a Revenue Tax Specialist II or requires fifteen years of supportive tax related experience, including completion of the Revenue Tax Specialist Trainee program and three years as a Revenue Tax Specialist II; requires extensive knowledge of current Illinois and federal tax laws, rules and regulations and out-of-state tax filing requirements; requires thorough knowledge of forms and documents utilized in the processing of tax returns and supporting documents; requires thorough knowledge of files, procedural manuals and other related materials utilized in their research and analysis of tax returns and supporting documents; requires extensive knowledge of tax accounting theory, principles and practices; requires extensive knowledge of computer systems, as related to the processing of various tax information; requires extensive knowledge of manual and automated office equipment; requires extensive knowledge of public relations principles and practices; requires extensive knowledge of methods, procedures and techniques utilized in developing and implementing training programs for technical staff in the review and analysis of tax returns and supporting documents; requires extensive knowledge of methods and procedures used in compiling and recording statistical information; requires ability to gain and maintain satisfactory working relationships with the public, other state and federal agencies, and other employees; requires ability to detect noncompliance with Illinois state tax laws and regulations; requires ability to detect computational, legal and/or technical errors in the process of analyzing tax returns; requires ability to take complex manual and automated corrective action within broad guidelines in cases involving delinquencies, deficiencies and other irregularities. Requires ability to converse and communicate in a clear and concise manner with persons at all organizational levels inside and outside the department. Requires ability to speak and write Spanish fluently at a colloquial skill level. Requires ability to lift and carry boxes of tax documents weighing up to 25 pounds.

% OF TIME	
15%	4. Provides technical assistance to lower level Revenue Tax Specialists and Revenue Tax Specialist Trainees performing similar but less complicated work; provides on-the-job technical training to new Revenue Tax Specialists and lower level clerical staff in applicable work methods and procedures; performs quality review of processed work of lower level staff; makes recommendations to revise operating procedures when applicable and participates in the development and testing of new procedures, changes in operating systems, correspondence, etc
10%	5. Recommends various courses of action, including jeopardy and penalty assessments, could determine responsibility and issue penalties, transferring corporate debt to responsible officers, determines extension of time for tax payments, and closing of cases determined to be uncollectable; recommends disposition of cases supported by documented information and evidence.
10%	6. Participates in staff meetings; assists supervisor in developing new and/or revised operating policies and procedures, staffing requirements, work schedules, etc.; recommending changes in procedure to expedite work flow, etc., and upon approval by management, ensures the implementation thereof. Participates in special project assignments. Compiles and prepares a variety of weekly, monthly and special reports of work processed and pending. Compiles the monthly Unit report.
05%	7. Coordinates the maintenance and operation of enforcement programs and the specific software that controls its operation; trains users on technical system features; monitors and evaluates the performance of the system.
05%	8. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.

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DEC 14 2012

**A & R SHARED
SERVICES CENTER**

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NOV 26 2012
By _____



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1. POSITION TITLE		WORKING TITLE (IF ANY)		Bilingual Code	Position Title Option Code	2. POSITION NUMBER			
Existing Position		DEC 14 2012				38573-25-01-100-99-04			
New/Revised Position		A & R SHARED SERVICES CENTER		03	CH	38573-25-01-120-11-02			
3. AGENCY		4. BUREAU/DIVISION			5. EXMT CODE	6. WORK COUNTY	7. AN AUTH.	8. AUDIT	9. OFFICE USE
Existing Position									
New/Revised Position		Board of Appeals Office			0	016	Y	R	
10. SECTION		11. UNIT			12. TRANSACTION CODE		13. EFFECTIVE DATE		
Existing Position							11/01/12		
New/Revised Position		Problems Resolution							
14. WORK LOCATION		15. BARGAINING/TERM CODE			Rule Exempt	<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MC022 EXEMPT CODE CHANGE <input checked="" type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			
Existing Position									
New/Revised Position		Cook			N				
% OF TIME	16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS								
	<p>Under general direction, as an advanced technical specialist, independently researches and analyzes all types of tax returns, supporting documents, taxpayer correspondence, manual and computer files in order to identify and correct filing, processing, complex mathematical, inappropriate support, legal and procedural errors; compiles documentation necessary to support and corrects or initiates corrective action; upon referral, communicates via correspondence, telephone and personal contact with taxpayers, accountants, attorneys and others in order to obtain additional supporting documents or in order to inform them of findings; conducts research and analysis in order to effect resolution of highly complex, controversial, sensitive or priority tax situations referred to the office by the Director's Office, Governor's Office or other sources internal as well as external to the Department; analyzes and resolves Voluntary Disclosure accounts; drafts recommendations and issues letters of relief for small Board cases. Responds and provides detailed current information regarding highly technical tax problems via telephone, correspondence or personal contact to taxpayers or their representatives unable to resolve a pending problem through regular Departmental channels; communicates and as necessary, translates into Chinese, for individuals who cannot speak English, via correspondence, telephone and personal contact with taxpayers, accountants, attorneys and other in order to obtain additional supporting documents or in order to inform them of findings; advises supervisor of specific processing and/or procedural problems encountered; attends professional accounting association meetings; provides technical guidance and assistance to lower level staff; participates in special project assignments as requested.</p>								
20%	<p>1. Analyzes complex and/or sensitive tax returns, claims, support documents, correspondence and Departmental records to determine mathematical, technical and legal accuracy of all types of tax documents processed as a result of referrals in the form of telephone inquiries, correspondence and personal contact from the Director's Office, members of the General Assembly or other sources internal as well as external to the Department; upon referral, communicates via correspondence, telephone and personal contact with taxpayers, accountants, attorneys and others in order to obtain additional supporting documents or in order to inform them of findings; provides information, guidance, advice and assistance to taxpayers, their representative, tax practitioners, attorneys, public officials and others who have been unable to resolve a pending problem through regular Departmental channels. Translates into Chinese for those individuals who cannot speak or read English. Routes exceptional accounts to supervisor for review and approval.</p>								
20%	<p>2. Independently researches and analyzes highly complex and often sensitive situations involving taxpayers returns and accounts; requires the ability to lift and carry up to 25 pounds. Researches records maintained by the Agency, including central files, computer files, printouts, microfilm, audit files, various tax laws, Federal tax laws, regulations, reference manuals, rulings, Sunshine Act, court decisions and operating procedures to ascertain proper application of the law to resolve discrepancies and initiate corrective action; monitors corrective action to ensure prompt implementation of solutions; responds to taxpayers inquiries explaining problems, law and resolution in layman's language in order to promote good rapport with the public.</p>								
20%	<p>3. Analyzes and resolves Voluntary Disclosure accounts from inception to end; drafts recommendations and issues letters of relief for small Board cases under Blanket Order 92-3003. Monitors adjustments and payments resulting from these Board orders.</p>								
DIRECTOR OF CMS SIGNATURE		IMMEDIATE SUPERVISOR SIGNATURE			AGENCY HEAD SIGNATURE		DATE		
<i>[Signature]</i>		<i>[Signature]</i>			<i>Brian Harner</i>		11/20/12		

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12-10-12

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MB [Signature]

16. (CONTINUED)

% OF TIME	
15%	4. Responds and provides detailed current information regarding highly technical tax problems via telephone, correspondence or personal contact to taxpayers or their representatives demanding immediate response who have been unable to effectively and timely communicate with the Department through normal channels and are demanding immediate response to urgent problems due to the complexity of the account, sensitivity of the issue, or the frustration of the hostile or irate taxpayer; information may include a computerized spreadsheet, explanation of Department policy, procedural applications, appeals process, nature of math error or notice of deficiency, and statutory references to help resolve the problem.
10%	5. Attends professional accounting association meetings or appears before other members of the Department and/or the Division in order to provide technical guidance and advice to supervisory and management personnel regarding various tax issues and recent development in that field. Performs special technical tax projects as assigned by supervisor.
05%	6. Provides technical guidance and assistance to lower level staff by explaining or clarifying tax laws, rules, regulations as applicable to given situations, advising on pertinent portions of regulatory and reference materials for precedents, trends and/or to ascertain proper application of tax laws.
05%	7. Serves as back-up timekeeper for the Chicago Problems Resolution staff, maintains timekeeping activities for staff by inputting timekeeping information, via personal computer, directly into the CTAS timekeeping system, balancing control records to central timekeeping's computer printout correcting any discrepancies found, compiling and preparing management reports on leave/dockage and authorized leave/compensatory time. Prepares weekly headcount report and forwards to management; calculates and maintains staffs individual accrued available time.
05%	8. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.

17. POSITION TITLE AND NUMBER OF IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

Public Service Administrator 37015-25-01-120-00-01

WORKING TITLE (IF ANY)

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

SUPERVISOR OR LEAD WORKER

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted.

If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount:

Position Title	Position Number	No. of Incumbent or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. **NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.**

Requires a Bachelors degree and requires seven years supportive tax-related experience, including completion of the Revenue Tax Specialist Trainee Program and three years as a Revenue Tax Specialist II, or requires fifteen years supportive tax-related experience, including completion of the Revenue Tax Specialist Trainee Program and three years as a Revenue Tax Specialist II; requires extensive knowledge of current Illinois and federal tax laws, rules and regulations, and out-of-state tax filing requirements; requires thorough knowledge of forms and documents utilized in the processing of tax returns and supporting documents; requires thorough knowledge of files, procedural manuals and other related materials utilized in their research and analysis of tax returns and supporting documents; requires extensive knowledge of tax accounting theory, principles, and practices; requires extensive knowledge of the computer systems utilized to process the various tax transactions and tax-related information; requires extensive knowledge of methods and procedures used in compiling and recording statistical information; requires extensive knowledge of manual and automated office equipment; requires extensive knowledge of public relations principles and practices; requires ability to detect computational, legal, or technical errors during the process of analyzing tax returns and supporting documentation; requires ability to gain and maintain satisfactory working relationships with the public and others; requires ability to take complex manual and automated corrective action within broad guidelines in cases involving delinquencies, deficiencies and other irregularities. Requires ability to converse & communicate in a clear and concise manner with persons at all organizational levels inside and outside the department. Requires ability to speak and write Chinese at a colloquial level. Requires physical ability to perform tasks. Requires the ability to lift and carry up to 25 pounds.



ILLINOIS DEPARTMENT OF
CENTRAL MANAGEMENT SERVICES

POSITION DESCRIPTION

1. POSITION TITLE Existing Position		WORKING TITLE (IF ANY)		Bilingual Code	Position Title Option Code	2. POSITION NUMBER			
New/Revised Position Revenue Collection Officer III				29	SS	38403-25-48-530-10-02			
3. AGENCY Existing Position		4. BUREAU/ DIVISION			5. EXMT CODE	6. WORK COUNTY	7. AUTH.	8. AUDIT	9. OFFICE USE
		Field Compliance Division							
New/Revised Position Revenue		Collections/Field Compliance Division			0	016	2	R	
10. SECTION Existing Position		11. UNIT			12. TRANSACTION CODE		13. EFFECTIVE DATE		
Region #4		District #2					08/01/2020		
New/Revised Position District #2					<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MC022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION				
14. WORK LOCATION Existing Position		15. BARGAINING/TERM CODE			Rutan Exempt				
New/Revised Position Cook County		RC062			N				
16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS									
% OF TIME	<p>Under direction, as a senior level collection officer with responsibility for an assigned District Office, serves as a designated officer in charge of the Retailers' Occupation Tax Revocation Program and Seizure Program; conducts special investigations of a sensitive nature; serves as training officer for lower level collectors; serves as officer in charge during large special events requiring training and direction of lower level collectors; in absence of supervisor, or at supervisor's request, reviews, approves or disapproves field collectors progress; attends and participates in District and Regional Office meetings; conducts, reviews and/or participates in field tax collection assignments to English and Spanish speaking taxpayers within a specific geographic area and assists in resolving backlogs in other geographic areas; assists supervisor with a variety of administrative related District Office duties; travels in the performance of duties.</p> <p>1. Serves as designated officer in charge of the Retailers' Occupation Tax Revocation Program. Prepares and serves ten day letters of demand, notices of hearing, and notice of decision. Schedules formalized Department hearings and gives sworn testimony at hearings. Recommends appropriate courses of action if the taxpayer has not been brought into compliance. Travels to taxpayer's place of business to serve compliance documents.</p> <p>15%</p> <p>2. Serves as designated officer in charge of the Seizure Program. Prepares and serves ten day letters of demand, tax liens, seizure warrants and releases of tax liens and seized property to English and Spanish speaking taxpayers. Travels to taxpayer's place of business to serve such documents. Recommends the appropriate course of action if the seizure fails to satisfy the assessed liability. Serves as liaison officer between the Department of Revenue and the local sheriff's office. Coordinates seizures with the Illinois State Police and liquidator of seized property to verify that the sale is accomplished.</p> <p>15%</p> <p>3. Conducts special investigations of a sensitive nature, e.g. governmental officials believed to be delinquent in tax monies owed the state or special requests from higher level management, necessitating detailed reports of procedures followed or conclusions so the Department's findings will not be repudiated. Travels to taxpayer's business for the collection of delinquent taxes, securing delinquent tax returns and determining taxpayer compliance to various tax laws.</p> <p>15%</p>								
DIRECTOR OF CMS SIGNATURE		IMMEDIATE SUPERVISOR SIGNATURE			AGENCY HEAD SIGNATURE			DATE	
<i>[Signature]</i> 39		AUG 05 2020			<i>[Signature]</i>			8/4/2020	

Shirley 9/18/20 *Shirley 9/18/20*

16. (CONTINUED)

% OF TIME	16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
15%	4. Serves as training officer for lower level collectors; participates in on the job training programs designed to provide lower level collectors with instructions on tax laws, agency rules and regulations, report preparation, work procedures and methods and collection techniques. As part of the training program, conducts on-site collection assignments in order to provide new collectors with work experience in applying the skills and knowledge's acquired during the classroom training period. Monitors the training and progress of new employees and frequently provides advice and assistance on the successful completion of assignments. Provides input in evaluating new employees during and at the completion of their training period. Serves as officer in charge during large special events requiring training and direction of lower level collectors.
10%	5. In absence of supervisor, or at supervisors request, reviews, approves or disapproves field collectors progress; reviews progress and final collection reports for completeness and adequacy of data, e.g., total amount of money collected is correct, supporting documents and evidence are consistent and complete, accuracy of final payment plans, recommended disposition of cases are in good order, etc. Approves or disapproves final reports and/or forwards questionable cases wherein the disposition of case may not be clear to supervisor, and forwards all recommendations for closing of cases when further collection activity would be futile or costly to the Department to supervisor for final decision. Confers with lower level collectors and advises them of errors made and recommends the proper course of action to correct reports. In absence of supervisor, or at supervisor's request, review daily field reports for accuracy of information, e.g., mileage, meals, lodging, parking fees, etc. Approves daily field reports before vouchers for reimbursements are prepared.
10%	6. Attends and participates in District and Regional Office meetings; assists in planning, developing and implementing new or revised methods, procedures, standards, and techniques; apprises District Office staff of new or revised statutes and other programs mandated by legislature; identifies training needs of field staff and participates in formal training programs.

17. POSITION TITLE AND NUMBER OF IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

Public Service Administrator

37015-25-48-530-00-01

WORKING TITLE (IF ANY)

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

SUPERVISOR OR LEAD WORKER

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted.

If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount:

Position Title	Position Number	No. of Incumbent or Funded Vacancies
As Collection Officer in Charge:		
Revenue Collection Officer Trainee	38405-25-48-530-10-02	2
Revenue Collection Officer I	38401-25-48-530-10-02	2
Revenue Collection Officer II	38402-25-48-530-10-02	2

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. **NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.**

Requires knowledge, skill and mental development equivalent to completion of four years of college and four of years professional experience in the delinquent tax collection field including two years of experience as a Revenue Collection Officer II. Requires ~~thorough~~ knowledge of various tax laws, rules and regulations, court decisions and other legal opinions applicable to the collection program. Requires ~~thorough~~ knowledge of tax collection methods and techniques. Requires ~~thorough~~ knowledge of accounting practices, methods, and procedures. Requires ~~extensive~~ knowledge of administrative techniques and practices utilized in staff management and organization. Requires ability to independently conduct collection assignments, exercising sound judgment and discretion in analyzing and evaluating facts and evidence. Requires ability to apply tax laws, rules and regulations appropriate to collection situations. Requires a valid driver's license and/or the ability to travel, often keeping irregular hours in the conduct of collection activities. Requires the ability to read and speak Spanish at a colloquial level.

% OF TIME	16. COMPLETE, CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
10%	7. Conducts, reviews and/or participates in field tax collection assignments to English and Spanish speaking taxpayers within a specific geographic area and assists in resolving backlogs in other geographic areas; makes personal calls in high risk areas on taxpayers who are antagonistic, potentially dangerous, under extreme emotional distress, and recalcitrant tax evaders; collects and assists other staff in collecting delinquent taxes when the lower level collector is unable to collect; serves as part of a collection team when the use of additional personnel is warranted, e.g., performing withholding tax audits when unable to obtain unfiled tax returns from corporations, partnerships and individual taxpayers, inspecting coin operated amusement devices for current licenses, etc. Participates in high profile compliance procedures, e.g., seizures, weigh station surveys and canvassing, which may involve media coverage. Travels in the performance of duties.
05%	8. In absence of supervisor, or at supervisors request, assists in a variety of administrative duties, e.g., conducts special studies of operations and compiles and prepares recommendations for changes in procedures to facilitate work in the office; compiles and prepares special production, activity and statistical reports.
05%	9. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.