

ILLINOIS DEPARTMENT OF CENTRAL MANAGEMENT SERVICES  
CLASS SPECIFICATION

REVENUE TAX SPECIALIST TRAINEE

POSITION CODE: 38575  
Effective: 11/01/2006

DISTINGUISHING FEATURES OF WORK:

Under immediate supervision, for a period of six to twelve months, participates in an agency-sponsored training program, receiving a combination of classroom and on-the-job training in tax laws, rules and regulations, tax forms, research methods and procedures, communications skills and basic computer concepts; receives supervised on-the-job training assignments to acquire a practical knowledge of various tax processes with periodic assessments throughout the training period.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Completes four to six weeks of formal classroom training which includes indoctrination and instructions in current Illinois State tax laws, rules and regulations, agency work flow and work procedures, including commonly used terminology, acronyms, and utilization of various tax related forms and documents.
2. Completes formal classroom training in basic data processing concepts; becomes familiar with computer hardware or automated equipment in order to become proficient in software packages relative to gaining access and securing taxpayer information.
3. Receives classroom and on-the-job training in utilization of regulatory or reference materials utilized in the research and analysis of tax returns and supporting documentation.
4. Receives formal classroom training on the legal process associated with processing all types of tax documents, the tax collection process and property tax processes.
5. Receives formal classroom training to acquire working knowledge of the legislative process and how state tax laws and regulations are adopted.
6. Receives six to nine months of closely supervised instruction and on-the-job training in the performance of all phases of manual and automated tax returns processing, review and edit, account adjustment and billing, taxpayer registration, taxpayer information, in-house tax collection, audit processes, property tax exemptions and sales tax exemptions.
7. After initial classroom and on-the-job training, receives training related to communication skills, business writing, telephone and interpersonal competence skills, such as how to effectively communicate with and provide services to taxpayers and county officials during normal work assignments, how to interview taxpayers to determine their tax situation, how to increase awareness of reactions on others, etc.

## REVENUE TAX SPECIALIST TRAINEE (Continued)

8. Accepts and completes assignments of increasing difficulty for the purpose of gaining experience and developing skills that allow the trainee to interpret tax laws, assist taxpayers, assist county officials, adjust accounts, register taxpayers, compute penalty and interest, calculate tentative and final property tax multipliers for counties, prepare assessments/sales ratio studies, compile statistical data and other routine and recurring functions relative to tax documents, property tax and tax collection processing; confers frequently with supervisory personnel during work assignments.
9. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.

### DESIRABLE REQUIREMENTS:

#### Education and Experience

Requires a bachelor's degree.

**OR**

Requires eight years of work experience with the Department of Revenue. 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.

#### Knowledges, Skills and Abilities

Requires ability to understand and follow oral and written instructions and prepare clear and concise reports.

Requires ability to profit from training received and become knowledgeable about the various tax laws and regulations enforced.

Requires ability to develop and maintain satisfactory working relationships with the public and other employees.

Requires ability to absorb and understand a variety of information regarding the development and utilization of tax analysis techniques.

Requires ability to add, subtract, divide and multiply quickly and accurately either with or without a calculator.

Requires ability to learn utilization of computer software and equipment.

Requires ability to obtain and/or convey necessary information in a tactful and diplomatic manner under difficult conditions.

Requires ability to recommend and/or initiate corrective action within established guidelines.

Requires maturity and stability to make personal adjustments as necessitated by work assignments, job pressures and demands.

In addition to having a written and spoken knowledge of the English language, candidates may be required to speak and write a foreign language at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.