Revenue Customer Representative

Job Code	Job Title	Pay Grade
4298A1	Revenue Customer Representative	19
4299A1	Revenue Customer Representative Senior	21
4300A1	Revenue Customer Representative Specialist	24

CONCEPT:

Work involves responding to customer and client questions regarding laws, policies, and procedures or inquiries regarding status of account or case. Interviews clients to obtain information. Determines program eligibility or applicability of guidelines. Processes program or license applications or registrations, processes transactions and makes case or account adjustments. Prepares documentation or correspondence regarding accounts, cases or records.

TASKS

- Provides customer service on accounts by managing customer calls, obtaining information from customers/clients and assessing needs. Contacts customer/client to correct incomplete information, resolve non-filed periods and/or account balance issues, or collect fees or unpaid obligations. Contacts employers, attorneys, accountants, tax preparers or other professional organizations in order to provide or obtain information relating to program activities and services.
- Educates customer/client in person or by phone of applicable laws, policies, procedures or programs, services, and/or resources; provides information regarding status of records, application, tax return, or other transactions; provides guidance on options to correct deficiencies, problems, or errors.
- Identifies and refers eligible customers/clients to programs and/or services.
- Prepares written reports or documentation on information obtained in interviews with customers, clients, or contacts with employers or other organizations; prepares correspondence; prepares reports on office activity.
- Provides account management for accounts by processing program applications, license applications, license renewals, and registrations.
- Performs full performance examinations of tax returns of average complexity such as individual income tax returns and sales tax returns. Processes amended returns, or other program documents and determines adherence to laws, completeness and accuracy of transaction. Validates consistency of data against other available data, such as federal returns or other matching information.
- Determines eligibility or account status. Processes account changes, corrections and accounting transactions. Reviews discrepancies and adjustment letter responses, reviews waiver requests, establishes accounts receivable payment plans, processes refunds, and approves benefits. Makes written determinations that deny or clear payment of benefits or refunds. Abates or assesses tax, penalty, interests, costs and fees. Makes monetary or nonmonetary determinations on initial and continued claims or accounts payable in accordance with applicable laws, rules, regulations, court decisions and appeals.
- Processes termination from program, termination of application/registration, or termination of particular accounts or records. May require use of accounting or mathematical calculations and maintenance of records and accounts in an automated system or database.
- May perform the routine work of more complex tax areas, such as Business Enterprise accounts which include multiple taxes such as sales, withholding and corresponding compensating use taxes.

LEVELS OF WORK

- Class Group consists of three classes.

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and retailer's compensating use tax. Typically these are accounts for one business location and filing frequency is annual, monthly, quarterly or seasonal. Ownership on these accounts include Individual or Sole Proprietor.
Minimum Requirements: Six months experience in interviewing, investigating or providing technical assistance to clients, customers, or the public. Education may be substituted for experience as determined relevant by the agency.
Necessary Special Requirements: Some positions in this class may require bilingual skills.

Revenue Customer Representative Senior: This is technical and specialized work in providing customer/client service and account or case management for moderately complex accounts or cases; OR supervisory work in planning and directing the work in a unit responsible for program compliance and eligibility requirements for customer/client base of moderate tax diversity. Work involves handling programs of moderately high difficulty or complexity by responding to customer or client questions regarding laws, policies, and procedures, or inquiries regarding status of account or case. Work at this level involves cases or accounts, which typically have multiple programs and/or several applicable laws of moderately high complexity, such as Business Enterprise or similar industry segment accounts. Moderately complex customer accounts typically include the work of average complexity such as sales tax, plus withholding tax and the corresponding compensating use taxes and the ownership type of partnership is added. Typically these are accounts for one business location and filing frequency is annual, monthly, quarterly or seasonal. Ownership on these accounts include Individual, Sole Proprietor, and Partnership.
Minimum Requirements: One year experience in interviewing, investigating or providing technical assistance to clients, customers, or the public, and one year experience or education in auditing or accounting support work. Education may be substituted for experience as determined relevant by the agency.
Necessary Special Requirements:
Some positions in this class may require bilingual skills.

Revenue Customer Representative Specialist: Work at this level involves accounts of the highest difficulty or complexity and typically have the greatest number of applicable laws and procedures and/or the most complex laws or procedures, such as Diversified Business or similar industry segment accounts. Highly complex customer accounts typically include the work of average complexity, moderate complexity and higher complexity, such as sales tax, withholding tax and the corresponding compensating use taxes as well as corporate taxes, accounts that have one or multi-locations and/or accounts with the filing frequency of annual, monthly, quarterly, seasonal or accelerated. Ownership on these accounts include Individual, Sole Proprietor, Partnership, and Corporations. This level may also exercise supervisory responsibilities over a team of subordinate staff responsible for programs, records and accounts. May plan, assign, review, and evaluate the work of employees engaged in technical activities. May review unit operations and workload in order to adjust staff work assignments and ensure efficient workflow. May adjudicate more complex benefit or program determination issues.
Minimum Requirements: Two years of experience in interviewing, investigating or providing technical assistance to clients, customers, or the public, and two years of experience or education in auditing or accounting support work. Education may be substituted for experience as determined relevant by the agency.
Necessary Special Requirements:
Some positions in this class may require bilingual skills.

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