

Position Description

Classified/Unclassified	Regular/Temporary	Full-Time/Part-Time	% of Time
Unclassified	Regular	Full-Time	100%
Employee Name		Position Number	Position Title
[REDACTED]		K0238864	Customer Representative
Supervisor Name		Supervisor Position Number	Supervisor Title
[REDACTED]		[REDACTED]	TAC Supervisor
Location		Department ID	Division
Scott Building		5658531000	Customer Relations
FLSA Status		Work Schedule	Regular Hours of Work
Non-Exempt		8 Hours/Day Mon - Fri	8:00 am - 5:00 pm

1. Please Summarize the duties of this position for posting in the job announcement. If this is a request to reallocate the position, briefly describe the reorganization, reassignment of work, new function added by law or other factors which change the duties and responsibilities of the position.

This position is in the Taxpayer Assistance Center of the Customer Relations Core Process. Educates customers in person or by phone of applicable laws, policies, procedures, services and resources. Provides customer with information regarding status of records, tax return or other transactions. Performs registration account management on established accounts that are sole proprietor, associations, joint ventures, corporations and trusts. Provides guidance on options to correct deficiencies, problems or errors. Conducts registration tasks for new customers on all appropriate tax types, including the processing of business applications, business tax returns and remittances. Reviews incoming correspondence and worklists associated with the registration process. Researches and applies correct North American Industry Classification System (NAICS) codes to the business tax application based on the business activity. Reviews the business tax application for completeness and accuracy. Requires a knowledge of current Kansas tax laws, regulations and department policies and procedures relating to the registration process and must keep abreast of new and amended legislation effecting Kansas business registration. Performs business registration for walk-in taxpayers/customers in overflow situations and provides start-up assistance and education regarding filing requirements, tax exemptions, due dates and penalty and interest. Has knowledge of Kansas Business Center (KBC) and Streamlined Sales Tax (SST) on-line business registration systems. May perform financial account adjustments, abatements and/or assessments. Provides daily customer assistance by greeting walk-in customers, assessing their needs and assisting the customer or routing them to the appropriate resource. Ensures that customers' needs are met in a professional and efficient manner.

2. How much latitude is allowed incumbent in completing work?

Significant

3. What kinds of instructions, methods and guidelines are given to the incumbent in this position to help do the work?

Verbal and written instructions from manager; written procedures, laws and regulations; and, moderately specific verbal computerized or written assignments.

4. Which statement best describes the results of error in action or decision of this incumbent?

Minor disruption of the flow of work, Minimal property damage

5. Describe the work of this position. Use the following format for describing the duties: What is the action being done (use action verb); to whom or what is the action directed (object of action); why is the action being done (describe the result or outcome expected); how is the action expected to be performed (describe the manner, methods, techniques or procedures in which the task is currently performed).

Number Each Task, Indicate Percent of Time and Identify each function as Essential or Marginal by placing an "E" or "M" next to the % of time for each task. Generally, the percent of time assigned to task statements should not be less than 5% and not more than 50% Essential functions are primary job duties for which the position was created and that an employee must be able to perform, with or without a reasonable accommodation. Marginal functions are peripheral, incidental or minimal parts of the position.

Note: The description of how the work is to be performed does not preclude the consideration of reasonable accommodation(s) for qualified persons with a disability.

The employee in this position has access to confidential information, which must be treated in accordance with the Kansas Department of Revenue Confidentiality Oath and applicable policies and procedures. The person will receive training as it relates to the duties of this position.

In addition to the tasks listed below, the employee is expected to adhere to the Mission and Vision of the agency and to identify personal strengths and developmental needs to increase job performance and career growth. Analyzes work processes, seeks new approaches and makes recommendations to enhance efficiency and effectiveness of the agency. Works professionally with staff, customers and the public, to provide efficient and effective customer service. Contributes to a productive team environment and uses free time as available to assist other staff in the completion of work assignments.

Recognizes responsibilities to the agency and applies effective work habits and attitudes to meet work requirements. Attends work regularly and on time, plans appropriately for absences and assumes personal accountability for work.

#	% of Time	E or M	Description of Duties
1	35%	E	Provides account management and exceptional professional customer service by processing business tax applications, answering phone and e-mail inquiries and some business tax return preparation. This service requires an above average knowledge of all taxes administered by the department. Requires knowledge of ASTRA Tax Processing (ATP) and Legacy computer systems to properly enter the registration data from the business tax application to establish the customer profile and tax accounts. Modifies existing registration account information by processing address changes and other registration data updates. Performs financial account adjustments when necessary such as generating tax assessments, creating tax account periods and moving remittance and returns from one taxpayer account to another according to taxpayer/customer information provided within the business tax application. Assembles information to be mailed to fill taxpayer/customer requests and generates mailing labels. Assists taxpayer/customer with questions regarding KBC SST business registration through the on-line registration process when necessary.
2	10%	E	Required to know the logging and coding piece of the registration process and act as a backup as needed to ensure accurate statistical tracking is provided for balanced scorecard measurement purposes. This requires research for the correct NAICS code, verifying the application is complete, accurate and in conformity with state statutes. Must determine the appropriate tax types needed based upon the business activity. Must identify and pull deficient applications from the work flow for follow-up correspondence or phone call.
3	15%	E	Provides customer assistance in Taxpayer Assistance Center (TAC) by greeting walk-in customers, assessing their needs and assisting the customer or routing them to the appropriate resource. Must have a basic knowledge of the activities performed by the department so all walk-in traffic and incoming calls are handled effectively. Routes calls or customers requiring specialized assistance to the appropriate resource.
4	20%	E	Reviews incoming correspondence and worklists associated with the registration process. From correspondence and worklists, update a customer or tax account on-line, review business closure process, generate letters for additional information, and process address changes, data updates, labels for mailing or educational materials.
5	10%	E	Provides customer service on general taxpayer inquiries by managing incoming customer calls, obtaining information from customers, and assessing needs. Educates customer regarding applicable laws, policies, procedures, services and resources. Provides information regarding status of applications, tax return or other transactions. Provides the customer with guidance on options to correct deficiencies, problems or errors.
6	10%	M	Maintain a professional team environment. Attend team meetings to provide suggestions for improvements and clarification in policies, procedures, services, education and resources. Pursue personal training and development opportunities related to performance of the job. Provides registrations training to new hires. Achieve individual and team results. Performs other job related duties as assigned.

6. Does this position directly supervise agency employees?

No

7. List the position titles and position numbers of all agency employees directly supervised by this position:

8. For what purpose, and with whom and how frequently are contacts made with the public, officials, or other employees?

Contact with	Frequency	Purpose	Other
Local Government Officials/staff	Daily	Obtain or verify information	
State Government Officials/staff	Daily	Obtain or verify information	
Federal Government Officials/staff	Frequently	Obtain or verify information	
Community Contacts	Frequently	Obtain or verify information	
Private Consultants	Daily	Obtain or verify information	
Business Owners	Daily	Obtain or verify information	
KDOR staff	Daily	Obtain or verify information	
Legislature	Occasionally	Obtain or verify information	
Public	Daily	Obtain or verify information	

9. What hazards, risks or discomforts exist on the job or in the work environment and describe any methods, techniques, or procedures that must be used to ensure safety for equipment, employees, customers, and others. Employee is encouraged to follow office safety practices to ensure safety for self and others in the office.

Position Requirement	Frequency
Walking	Daily
Working with upset customers on the phone and/or in person	Daily
Standing	Occasionally
Sitting	Daily

10. Check all machines that are regularly used in the work of the position and indicate frequency with which they are used.

Equipment	Frequency
Computer	Daily
Telephone	Daily
Copier	Daily
Fax Machine	Daily
ACM, ASTRA	Daily

11. Minimum Requirements (MR) as stated in the State of Kansas Class Specification.

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.

12. Special Requirements: Additional qualifications for this position that are necessary to perform the Essential Functions of the position (i.e. license, registration or certification).

13. Security Clearance Requirements: The Security Clearance requirements for this position are:

1*--KBI and FBI fingerprint required due to access to Federal Tax Information files in KDOR systems

14. Preferred education, skills, and experience. (These items will be used to screen applicants when recruiting to fill the position.)

Preferred Education	Degree Area
High School/GED	
Preferred Skills	Description
Computer	Word, Excel, PowerPoint, Access
Grammar	Proofreading, editing, attention to detail

Preferred Experience:

Demonstrate good personal time-management and customer service skills; knowledge of Kansas tax statutes, regulations and policies; ability to work effectively in a team-based environment; understanding of Kansas Department of Revenue's (KDOR) accounting software including ASTRA Tax Processing (ATP), ASTRA Case Management (ACM) and Legacy and be able to work effectively in these systems; ability to effectively review outbound correspondence and work with correspondence viewer; knowledge and understanding of the statutes and procedures regarding special credits and NOL's; and, review and adjust moderately complex accounts.

Position Status: Under Internal Review

Print Date: 4/23/2024