



# Tax Analyst

CLASS TITLE	CLASS CODE	SALARY GROUP	SALARY RANGE
TAX ANALYST I	1065	B23	\$61,184 - \$99,658
TAX ANALYST II	1066	B24	\$65,104 - \$106,634
TAX ANALYST III	1067	B25	\$69,572 - \$114,099
TAX ANALYST IV	1068	B26	\$76,530 - \$129,430
TAX ANALYST V	1069	B27	\$84,182 - \$142,374

## GENERAL DESCRIPTION

Performs tax research and analysis work involving conducting research, evaluating research findings, and responding to taxability inquiries; and interpreting tax laws, rules, and regulations.

## EXAMPLES OF WORK PERFORMED

Drafts proposed rules and rule amendments to reflect changes in legislation, hearings decisions, court cases, or agency policies.

Interprets state tax laws, rules, regulations, and fees for taxpayers, tax professionals, state officials, and agency personnel.

Researches taxability inquiries, provides tax-related guidance, and drafts written responses to ruling requests.

Performs related work as assigned.

## DESCRIPTION OF LEVELS

*Examples of work and descriptions are meant to progress through the levels. For example, an employee at level V may also perform work listed within the previous levels.*

**Note:** *Factors that may distinguish between the journey and senior levels include the degree of independence in performing the work; the complexity of the work; the scope of responsibility; and the employee's related work experience, education, and certifications. Employees at the journey levels (levels I – II) may independently perform the full range of work identified within current or previous levels and may assist others performing work of greater complexity.*

**TAX ANALYST I:** Performs routine (journey-level) tax research and analysis work. Works under moderate supervision, with limited latitude for the use of initiative and independent judgment. Employees at this level may have limited experience or no experience and spend the majority of their time performing simple to routine work following standard procedures.

**TAX ANALYST II:** Performs complex (journey-level) tax research and analysis work. Works under general supervision, with moderate latitude for the use of initiative and independent judgment. Employees at this level may rely on direction from others to solve problems that are not standard. Employees at this level may:

- Provide legislative analyses of assigned legislation and prepare information required for administrative cost estimates.

***Note:** Senior-level employees may perform the full range of work identified in the levels preceding their own, and/or may coordinate and/or oversee that work for others. Factors that may distinguish between senior levels include the scope of responsibility, oversight, and authority; and the nature, complexity, scope, and impact of the work performed.*

*Senior-level employees (levels III-V) may serve in a lead or supervisory role; however, supervisory responsibilities within this job classification series will typically be found at levels IV and V, depending on the structure and size of the supervised workgroup.*

**TAX ANALYST III:** Performs highly complex (senior-level) tax research and analysis work. May supervise the work of others. Works under limited supervision, with considerable latitude for the use of initiative and independent judgment. Employees at this level may:

- Develop, amend, and complete legislative summaries, notices, brochures, bulletins, letters, and other materials for publication.
- Analyze and recommend proposed tax legislation and determine the effect on the agency and industry.
- Develop and present seminars to industry groups and agency personnel.

**TAX ANALYST IV:** Performs advanced (senior-level) tax research and analysis work. Works under minimal supervision, with considerable latitude for the use of initiative and independent judgment. Employees at this level may fully perform advanced tax analyst work:

- Research tax issues and make recommendations for the administration of state and local taxes.
- Provide legislative testimony on issues related to taxes administered by the agency.

**TAX ANALYST V:** Performs highly advanced (senior-level) tax research and analysis work. Works under minimal supervision, with extensive latitude for the use of initiative and independent judgment. Employees at this level may be considered technical experts in the field and may:

- Review and edit taxability guidance for publication.
- Provide implementation plans and other assistance to legislative staff during legislative session.
- Conduct meetings with taxpayers, tax professionals, and industry representatives.
- Implement changes for the administration of state and local taxes.

## **GENERAL QUALIFICATION GUIDELINES**

### **EXPERIENCE AND EDUCATION**

Experience in researching, analyzing, and interpreting tax laws, rules, or regulations. Graduation from an accredited four-year college or university with major coursework in accounting, business or public administration, or a related field is generally preferred. Experience and education may be substituted for one another.

### **KNOWLEDGE, SKILLS, AND ABILITIES**

#### **For all levels**

- Knowledge of state and federal laws, rules, and regulations; of agency administrative rules and regulations; and of principles and processes for providing customer service.
- Skill in identifying, resolving, and preventing problems by using strong analytical techniques and innovative approaches; and in the use of a computer and applicable software.
- Ability to analyze and interpret rules, regulations, policies, and procedures; to maintain confidentiality and protect the privacy of state employees, taxpayers, and other members of the public; and to communicate effectively.

#### **Additional for Tax Analyst III – V levels**

- Ability to supervise the work of others.