



Job Description

Working Title: Individual Income Tax Auditor 2	Job Code: AUN08103	Reports To: Manager, Audit
Job Code Descr: Auditor 2	Position Number/s: SRV000000047, SRV000000278, SRV000000289, SRV000000397, SRV000000182	
Division/s: Education & Compliance	Department Name/s: Income Audit Unit	Law Enforcement: No
Pay Schedule/Grade: AREG 19	FLSA Status: Non-Exempt	EEO Class: Administrative Support Workers
Prepared By: C Pittman/ R Rodriguez	Approved By: J Brown	Last Update: 12/19/2023

Position Summary:

The Individual Income Tax Auditor 2 conducts routine to moderately-complex audits that are small to medium in scale, and research, analysis and review of individual income tax refunds claims. These responsibilities are completed using acceptable audit methods and procedures to ensure taxpayers are in compliance with Arizona tax law, rulings and case law. This role is also responsible for creating and maintaining monthly production charts on behalf of the unit, conducting research and working on special projects on behalf of senior team members and management, as assigned.

Supervision:

This position does not have direct reports.

Essential Functions:	% of Time	Essential/ Non-essential
<u>Tax Return Audit</u> Conducts routine to moderately-complex audit and refund reviews involving the accurate calculation and application of tax laws, rules and regulations, policies, and procedures of the department in a consistent manner for all taxpayers including: <ul style="list-style-type: none"> • The accurate and timely examinations of audits based on information requested through correspondence with taxpayers and/or changes in calculations resulting from information provided regarding the audit • Reviewing returns and making determinations and corrections • Eliciting clarifying information, accepting evidence, evaluating testimony in a written decision, and preparing case files if/as necessary • Fully documenting audits to support the Department's position and maintaining the audit file in an orderly manner • Preparing audit reports and other reports • Making adjustments to taxpayer accounts in the tax system and tax system data cleanup to, including those accounts flagged for potential fraud • Responds to and resolves inquiries received in tickets and email • Attends and represents the Department both at informal and formal court hearings requiring in-state travel 	50%	E 1, 2, 3, 4, 5
<u>Research & Analysis</u> <ul style="list-style-type: none"> • Reviews, researches, and responds to taxpayer inquiries and emails • Reviews, researches, and completes audit and refund reviews 	20%	E 1, 3, 4, 5



Job Description

<ul style="list-style-type: none"> Conducts technical reviews of audit files including research and examination Conducts research on behalf of senior team members and management to create and maintain monthly production charts 		
<p><u>Agency/Department Compliance & Continuous Improvement</u></p> <ul style="list-style-type: none"> Remains current on all laws, regulations, policies, and best practices related to taxation through regular engagement in activities such as: self-directed research, conferring with other practitioners and technical experts; subscriptions to regulatory/legal/industry newsletters and briefs; membership industry associations and attendance at meetings/events; and or participation in training and others continuing education opportunities. Actively contributes to team and individual effectiveness through the following: <ul style="list-style-type: none"> Attends staff meetings and huddles of work unit or district; and may cascade and track information as indicated Completes all required training in a timely manner. Participates in assigned work teams as appropriate. May complete periodic metrics, projects, huddle boards and reports as requested. Prepares for and actively participates in 1:1 coaching with supervisor Maximizes work processes and deliverables through lean principles within the Arizona Management System (AMS); and provides recommendations for process improvement, and engages in continuous improvement efforts as assigned. 	20%	E 3, 5
<p><u>Taxpayer Education</u></p> <p>Educates taxpayers in tax law, rules and regulations and ensures taxpayer compliance through the audit process.</p>	5%	E 1, 2, 5
Other duties as assigned	5%	NE

Requirements

Education & Experience

- Any combination that meets the knowledge, skills and abilities (KSA); typical ways KSAs are obtained may include but are not limited to: a relevant degree from an accredited college or university such as Associate's Degree (e.g., A.A.), training, coursework, and work experience relevant to the assignment.
- Minimum one year related experience as an Auditor or equivalent

Licenses & Certifications

None

Knowledge/Understanding

- Basic knowledge of individual income tax policy and procedures
- Basic knowledge of applicable federal and state tax laws, statutes, and codes
- Basic knowledge of generally accepted accounting principles (GAAP)
- Basic knowledge of generally accepted auditing standards (GAAS)

Skills

- Strong verbal, written, and listening communication skills
- Strong mathematical computation skills such as addition, subtraction, multiplication, division, percentage, and averages



Job Description

- Strong interpersonal skills and demeanor
- Effective organization and time management skills with the ability to make measurable progress on multiple priorities
- Proficient in the use of a PC/laptop in a Windows environment; in the use of the Internet; and in the use of Google Suite applications such as Gmail, Sheets, Docs, and Drive; and Microsoft Excel
- Proficient in the accounting systems

Abilities

- Ability to clear a comprehensive background and clearance process that includes an Arizona tax compliance verification, and a criminal background check through the FBI via level one fingerprint clearance through the Arizona Department of Public Safety
- Ability to work in a confidential manner, ensuring information is shared with internal and external individuals in an appropriate manner
- Ability to interpret and apply federal and state tax laws to audit reviews tax refund claims
- Ability to convey tax related terminology and information in layman's terms
- Ability to work with a high degree of autonomy and also participate collaboratively as part of a team
- Ability to understand and solve problems by applying basic analytical skills to include collecting all the relevant information and data needed to address the problem; organizing, classifying and synthesizing the data into fundamental issues; from the information, identifying the most probable causes of the problem; reducing the information down into manageable components; identifying the logical outcomes from the analyses of the data collected; and, identifying the options and solutions for addressing the problems analyzed.
- Ability to travel up to 5% of the time to participate in hearings
- Willingness and ability to embody ADOR's core values of Do the Right Thing, Commit to Excellence, and Care About One Another

Additional Job Demands

- In the course of performing the essential duties one must be able to exert up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects
- Ability to operate a state-owned and/or personal vehicle
- May experience exposure to adverse environmental conditions during travel

Selective Preferences

- Bachelor's Degree in Accounting or closely related field
- Experience with Continuous Improvement, Six Sigma and/or LEAN