



Job Description

Working Title: Transaction Privilege Tax Auditor 4	Job Code: AUN04603	Reports To: Audit Manager
Job Code Descr: Auditor 4	Position Number/s: SRV000001045, SRV000001470, SRV000000045, SRV000001046, SRV000000475, SRV000000249, SRV000001053, SRV000001060, SRV000001041, SRV000001356	
Division/s: Education and Compliance	Department Name/s: Transaction Privilege Tax Audit	Law Enforcement: No
Pay Schedule/Grade: AREG 23	FLSA Status: Exempt	EEO Class: Administrative Support Workers
Prepared By: C Pittman, G Cavender, K Helfrich, T Benson	Approved By: J Brown	Last Update: 4/12/2024

Position Summary:

The Transaction Privilege Tax (TPT) Auditor 4 serves as a team lead and subject-matter-expert within their respective unit, and is responsible for the workflow coordination of the team, mentoring of team members, and serving as a team first point of escalation. This role is responsible for performing large, complex audits and refund reviews for all taxing jurisdictions subject to transaction privilege and use tax, and reviewing various state/city/town tax issues from average to difficult complexity. This role determines tax liabilities involving transaction privilege, excise, and use taxes, and prepares working papers and recommendations for the final audit memorandum. This role is also responsible for conducting occasional field audits, which may require in and out of state travel, up to two weeks in duration.

Supervision:

This position does not have direct reports.

Essential Functions:	% of Time	Essential/ Non-essential
<u>Lead</u> Serves as a team lead within their respective unit to include: <ul style="list-style-type: none"> • Subject-matter expert within the their respective unit • First point of escalation for junior team members • Workflow coordination of junior team members • Peer mentor to junior team members • Provides "backup" monitoring for supervisor, as needed • Contributes toward positive team culture • Develops procedures and training materials to assist with team training 	15%	E 1, 2, 3, 5
<u>Audit Reviews</u> Conducts 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 to all taxpayers: <ul style="list-style-type: none"> • 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 • Inspects and examines returns, makes determinations, and recommends return of audits 	30%	E 1, 2, 3, 4, 5



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<ul style="list-style-type: none"> Elicits clarifying information, accepts evidence, evaluates both testimony in a written decision, and prepares case files if/as necessary Fully documents audits to support the department's position and maintain the audit file in an orderly manner Prepares work papers, audit reports, and weekly reports Assists management with special assignments, including reviewing, approving, and processing audit and refund files 		
<u>Research & Analysis</u> <ul style="list-style-type: none"> Researches complicated issues and resolves taxpayer appeals timely, fairly, accurately and consistently Explains audit adjustments and conclusions to taxpayers and/or representatives Discusses audit adjustments and positions with taxpayers and/or representatives Educates taxpayers in tax law, rules and regulations and ensures taxpayer compliance through the audit process. 	25%	E 1, 2, 3, 5
<u>Field Audits</u> <ul style="list-style-type: none"> Conducts in-person, in- and out-of-state field audits, as assigned 	5%	E 4, 5
<u>Agency/Department Compliance & Continuous Improvement</u> <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
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 Bachelor's Degree (e.g., B.A.), training, coursework, and work experience relevant to the assignment.
- Minimum three (3) years' related auditing experience

Licenses & Certifications

Valid Arizona Driver's License



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Knowledge/Understanding

- Advanced knowledge of transaction privilege and use tax laws, policies, and procedures
- Advanced knowledge of applicable state, city, and town tax codes
- Advanced knowledge of auditing methods, systems, standards, and procedures
- General knowledge of generally accepted accounting principles (GAAP)
- General knowledge of generally accepted accounting standards (GAAS)

Skills

- Strong and effective communications skills, to include verbal, written, and active listening with the ability to convey tax related terminology and information in layman's terms
- Strong mathematical computation skills such as addition, subtraction, multiplication, division, percentage, and averages
- Strong organization and time management skills
- Strong interpersonal skills and demeanor
- 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
- Strong proficiency and skill in the use of Microsoft Excel
- Strong proficiency in the use of tax reporting and 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 interpret and apply federal and state tax laws to audit reviews
- Ability to work with a high degree of autonomy and also participate collaboratively as part of a team
- Ability to work in a confidential manner, ensuring information is shared with internal and external individuals in an appropriate manner
- Ability to build strong working relationships and partnerships with internal and external customers and stakeholders
- Ability to understand and solve problems by applying strong 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 both in-state and out-of-state for trips of up to 2 weeks in length
- 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



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- Certified Internal Auditor (CIA), Certified Public Accountant (CPA), Certified Fraud Examiner (CFE), Certified Information Systems Auditor (CISA) and/or Certified Government Auditing Professional (CGAP)
- Experience with Continuous Improvement, Six Sigma and/or LEAN
- Bilingual in English/Spanish
- Previous team lead experience