

POSITION DESCRIPTION

IMPORTANT: PLEASE READ INSTRUCTIONS ON PAGES 2 and 3

DOA-15302 (C07/2015) PREVIOUSLY OSER-DMRS-10 State of Wisconsin Department of Administration/Division of Personnel Management	1. Position No. 031737	2. Cert / Reclass Request No. 24-9972	3. Agency No. 566
4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue IS&E/Audit/Corporation/Unit E		
6. CLASSIFICATION TITLE OF POSITION Revenue Auditor 6	8. NAME AND CLASS OF FORMER INCUMBENT		
7. CLASS TITLE OPTION (to be filled out by Human Resources Office)	10. NAME & CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES		
9. AGENCY WORKING TITLE OF POSITION Corporation Tax Books and Records Auditor – Advanced	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?		
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Revenue Management Supervisor	13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes ___ No <u>X</u> IF YES, COMPLETE AND ATTACH A SUPERVISOR EXCLUSION ANALYSIS FORM.		

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

SEE ATTACHED

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION (Please see sample format and instructions on Page 3.)

- _ GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- _ WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- _ TIME %: Include for goals and major worker activities.

TIME %	GOALS AND WORKER ACTIVITIES	(Continue on attached sheets)
	SEE ATTACHED	

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See Instructions on Page 2)

- a. The supervision, direction, and review given to the work of this position is close limited general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.
(Please initial and date attachments.)

Signature of first-line supervisor _____ Date _____

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee _____ Date _____

18. Signature of Human Resources Manager _____ Date _____

DISTRIBUTE COPIES OF SIGNED FORM TO:

- P-FILE SUPERVISOR EMPLOYEE CERT REQUEST COPY

REVENUE AUDITOR 6 – CORP BOOKS AND RECORDS – ADVANCED

Position # 031737

August 11, 2024

POSITION SUMMARY (Line 14)

This is an advanced level position that acts as a lead worker of Books and Records Auditors responsible for auditing corporations for income and franchise taxes. This position is responsible for coordinating and providing section specific training, providing individualized training and mentoring, and reviewing audits for quality. The position will assist other auditors with negotiating audit determinations and researching and responding to the most complex technical and systems issues relating to corporation income and franchise taxes. The position will work with other sections in coordinating audits of other tax types and with auditors and managers in other states in determining best practices. Work is performed under general supervision.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

- 70% A. Performance of Lead Worker activities for unit staff.
 - 15% A1. Examine audit reports for conformity with department policies, procedures and laws, and to assure uniform treatment of taxpayers.
 - 15% A2. Examine books and records auditors' work papers to verify compliance with assignment instructions and to assure evidence supports adjustments proposed.
 - A3. Communicate with auditor or his/her supervisor regarding questionable items or revisions and refer back to auditor or revise report as necessary.
 - A4. Update systems to generate action letters, review transmittal letters and assemble audit reports.
 - 10% A5. Develop, coordinate, and conduct training programs for new and experienced auditors; tailoring training to the tax type and technical ability of various audiences as required.
 - 10% A6. Provide individualized training to employees on an as needed basis, including assisting them with researching and responding to complex technical and systems issues and reviewing work-in-process.
 - 10% A7. Conduct audits that involve the most complex issues; either independently or in a mentoring role to assist other auditors with those issues.
 - A8. Assist auditors with negotiating audit settlements.
 - A9. Monitor and evaluate professional development of unit/section auditors.

- 20% B. Research of complex technical and systems issues.
 - B1. Perform complex tax research, seeking review from Administration Technical Services as appropriate, for purposes of responding to auditor and taxpayer inquiries or assisting in auditors with ongoing audits.
 - B2. Collaborate with peers at the Internal Revenue Service (IRS) and other states' revenue departments to learn and share best practices regarding technical and systems issues
 - B3. Review bureau and section policies and procedures and make recommendations to supervisor or project team.
 - B4. Recommend revisions to administrative rules and directives, section bulletins, and forms and instructions.
 - B5. Assist section supervisors and/or chiefs and the Audit Program Development Unit with analyzing data for books and records audit selection and process improvements; evaluating and recommending WINPAS enhancements; testing and post implementation review of WINPAS enhancements.

REVENUE AUDITOR 6 – CORP BOOKS AND RECORDS – ADVANCED

Position # 031737

August 11, 2024

- 10% C. Assistance with miscellaneous tasks.
 - C1. Provide taxpayer education and assistance.
 - C2. Participate in process improvement teams.
 - C3. Assist with recruiting new auditors.
 - C4. Develop recommendations for legislation.
 - C5. Perform other duties as required.

REVENUE AUDITOR 6 – CORP BOOKS AND RECORDS – ADVANCED

Position # 031737

August 11, 2024

KNOWLEDGE, SKILLS AND ABILITIES

1. Knowledge of Wisconsin and federal corporation franchise/income tax and/or tax credit laws.
2. Knowledge of Wisconsin and federal legal precedents, IRC regulations, federal revenue rules and procedures, federal publications, Wisconsin statutes, administrative code, audit manuals, and publications, and department policies.
3. Knowledge of related accounting and audit practices.
4. Knowledge of audit procedures and techniques.
5. Knowledge of Wisconsin tax forms.
6. Ability to develop, apply, interpret, and enforce bureau and section policies and procedures for audits and appeals.
7. Knowledge of excellent customer service principles, including "Plain Language".
8. Knowledge of the Department's integrated tax system (WINPAS).
9. Knowledge of research techniques and resources.
10. Knowledge of procedures used in other bureaus or work units which directly affect tax returns.
11. Knowledge of work rules.
12. Knowledge of effective committee/team participation techniques, including Lean principles.
13. Ability to build and leverage relationships with employees and peers across the organization.
14. Skill in leadership and managerial principles; ability to inspire and motivate others to perform well and effectively influence actions and opinions of others.
15. Knowledge of mentoring and training techniques.
16. Effective written and verbal communication skills.
17. Organizational and prioritization skills.
18. Skill in using Microsoft Office Products (e.g., Excel, Word, Outlook) or equivalent.
19. Customer services skills.

Special Requirements: This position requires that applicants have professional education, training, or work experience in accounting or auditing such as that which would be acquired by earning a Bachelor's Degree in accounting or auditing from an accredited post-secondary college/university; or equivalent in education, training and/or work experience.

This position requires regular travel. Therefore, possession of a valid Driver License and the availability and use of a personal vehicle during work hours are conditions of employment.