



New Mexico State Personnel Office

2600 Cerrillos Road
Santa Fe, New Mexico 87505-0127

Classification Description

TAX INFORMATION AND POLICY SPECIALIST

<u>Class Title</u>	<u>Class Code</u>	<u>Pay Band</u>	<u>Alt Pay Band*</u>
Tax Information and Policy Specialist	C20700	70	

**In accordance with SPB Rule 1.7.4.10 NMAC, the assignment to alternative pay bands shall be reviewed annually to determine their appropriateness.*

Occupation Description

Analyzes and interprets tax laws, rules, rulings and decisions for the purpose of advising taxpayers compliance. Prepares publications, rules and rulings for use by taxpayers, taxpayer representatives, government officials and employees. Assist local governments with the implementation of local option taxes.

Nature of Work

The position is responsible for making independent determinations concerning the taxability of each set of circumstances presented; this involves the analysis of statutes, regulations, Taxation and Revenue Department rulings, Decisions and Orders, and court cases. The position is responsible for disseminating tax information and advising System personnel on how to program technical tax information for use by employees and the public. The position advises local governments on whether legal requirements have been fulfilled to impose local options taxes and adoption of new annexations. The position will be expected to draft tax related publications, rules and rulings (legally binding documents on the interpretation of state tax law); Review and analyze proposed tax legislation; Interpret tax related statutes and rules and provide oral and written clarification based on that interpretation; Draft and review Fiscal Impact Reports and oversee internal review of legislation; Assist with the implementation of new legislation.

Distinguishing Characteristics of Levels

Examples of work are intended to be cumulative for each progressively higher level of work. The omission of specific statements does not preclude management from assigning other duties which are reasonably within the scope of the duties.

- Provide verbal and written responses to tax-related inquiries.
- Analyze, interpret, and apply appropriate tax laws, rules, rulings and decisions to situations presented during a tax inquiry.
- Discuss with supervisor appropriate tax laws, rules, rulings and decisions while formulating a response to tax inquiries as needed.
- Conduct and/or participate in tax workshops and seminars.
- Edits existing department publications, draft new publications as needed and ensure current publication are available to the public.
- Review the work of others in the department and less experienced tax information specialists.
- Assist less experienced department employees on various tax matters.
- Assist with inquiries of local government officials related to the enactment of local option taxes.

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- Edit, draft and publish rules and rulings.
- Perform advanced technical research of New Mexico tax statutes, rules, rulings, Decisions and Orders, and court cases in order to provide technical guidance to taxpayers, taxpayer representatives and employees.
- Independently review and analyze contracts to determine tax liability or other tax-related legal issues.
- Assist Legal Services Bureau in legal matters.
- Assist with the tracking of proposed legislation, development and distribution of FIRs and implementation of new legislation.

Recommended Education and Experience for Full Performance

Bachelor's Degree in Government, Political Science, Public Administration, Business Administration, Taxation, Journalism, English or Creative Writing and seven (7) years of experience in state taxation programs.

Minimum Qualifications

Bachelor's Degree in Government, Political Science, Public Administration, Business Administration, Taxation, Journalism, English or Creative Writing and five (5) years of experience in state taxation or public administration. Any combination of education from an accredited college or university in a related field and/or direct experience in this occupation totaling nine (9) years may substitute for the required education and experience.

Knowledge and Skills

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Knowledge

Customer and Personal Service — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.

Administration and Management — Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.

English Language — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

Personnel and Human Resources — Knowledge of principles and procedures for personnel recruitment, selection, training, compensation and benefits, labor relations and negotiation, and personnel information systems.

Computers and Electronics — Knowledge of circuit boards, processors, chips, electronic equipment, and computer hardware and software, including applications and programming.

Clerical — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and other office procedures and terminology.

Sales and Marketing — Knowledge of principles and methods for showing, promoting, and selling products or services.

Education and Training — Knowledge of principles and methods for curriculum and training design, teaching and instruction for individuals and groups, and the measurement of training effects.

Skills

Active Listening — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

Reading Comprehension — Understanding written sentences and paragraphs in work related documents.

Speaking — Talking to others to convey information effectively.

Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.

Complex Problem Solving — Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

Judgment and Decision Making — Considering the relative costs and benefits of potential actions to choose the most appropriate one.

Writing — Communicating effectively in writing as appropriate for the needs of the audience.

Monitoring — Monitoring/Assessing performance of yourself, other individuals, or organizations to make improvements or take corrective action.

Social Perceptiveness — Being aware of others' reactions and understanding why they react as they do.

Systems Analysis — Determining how a system should work and how changes in conditions, operations, and the environment will affect outcomes.

Statutory Requirements: N/A

Conditions of Employment: Working Conditions for individual positions in this classification will vary based on each *agency's utilization, essential functions, and the recruitment needs* at the time a vacancy is posted. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.

Default FLSA Status: Exempt.

Bargaining Unit: This position is not covered by a collective bargaining agreement.

Established: 10/12/2012

Revised:

Note: Classification description subject to change. Please refer to the SPO website www.spo.state.nm.us to ensure this represents the most current copy of the description.