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JB Pritzker
Governor

David Harris
Director

STATE OF ILLINOIS
DEPARTMENT OF REVENUE

MEMORANDUM

To: The Honorable Don Harmon
Senate President


The Honorable Emanuel "Chris" Welch
Speaker of the House

The Honorable John Curran
Senate Republican Leader

The Honorable Tony M. McCombie
House Republican Leader

Mr. Tim Anderson
Secretary of the Senate

Mr. John W. Hollman
Clerk of the House

From: David Harris
Director 

Date: March 24, 2026

RE: State Services Assurance Act, 2026

The State Services Assurance Act, Public Act 95-707, passed in November 2008, requires each state agency to report to the General Assembly annually, their staffing level of bilingual employees.

Enclosed, please find the 2025 report of bilingual employees currently employed at the Illinois Department of Revenue. Establishing positions with multilingual options and incorporating multilingual skills into existing positions allows our agency to provide better services more efficiently to the public.

Should you have any questions or need additional information, please contact the Department's EEO Officer, Shelby Kaiser, at **217-524-7003**.

Department of Revenue Bilingual Positions, March 2026 (PA 95-7078, State Services Assurance Act)

Hire Date	Full Name	Program Area (Division)	Position Title	Position Language	Bilingual Amount	Position Number
05/16/2022	CRUZ, EDGAR	Taxpayer Services	REVENUE TAX SPECIALIST I	Spanish	\$ 274.00	38571-25-82-110-51-02
08/01/2025	FOX-VELAZQUEZ, EDUARDO	Taxpayer Services	REVENUE TAX SPECIALIST TRAINEE	Spanish	\$ 244.00	38575-25-82-110-51-02
12/01/2025	GARCIA, ALEXANDER	Account Processing	REVENUE TAX SPECIALIST TRAINEE	Spanish	\$ 222.00	38575-25-31-170-99-02
01/02/2020	MATAMOROS-BAUGHM, IZAYANA J	Account Processing	REVENUE TAX SPECIALIST II	Spanish	\$ 313.00	38572-25-33-100-99-02
09/02/2025	MENDEZ, MONICA L.	Audit	REVENUE TAX SPECIALIST TRAINEE	Spanish	\$ 244.00	38575-25-41-000-00-02
03/08/2004	MENDIOLA, JULIO C	Audit	REVENUE AUDITOR III	Spanish	\$ 537.00	38373-25-41-130-99-02
07/01/2024	MONTILLA DOMINGUEZ, MIRNA C.	Collections	REVENUE TAX SPECIALIST I	Spanish	\$ 248.00	38571-25-48-100-99-02
03/16/2012	PEREZ, III, LUIS F.	Collections	REVENUE TAX SPECIALIST II	Spanish	\$ 345.00	38572-25-48-100-99-02
08/02/2021	PEREZ, YESENIA	Collections	REVENUE TAX SPECIALIST II	Spanish	\$ 331.00	38572-25-48-570-20-02
12/16/2025	PIMIENTA ELIZONDO, MARTIN R.	Account Processing	REVENUE TAX SPECIALIST TRAINEE	Spanish	\$ 230.00	38575-25-31-170-99-02
06/03/2019	PORTILLO, CINDY L	Collections	REVENUE TAX SPECIALIST II	Spanish	\$ 345.00	38572-25-48-570-20-02
12/01/2025	RAMIREZ, SANDRA T.	Account Processing	REVENUE TAX SPECIALIST TRAINEE	Spanish	\$ 273.00	38575-25-31-170-99-02
08/01/2024	RIJO, VICTORIA D.	Audit	REVENUE TAX SPECIALIST I	Spanish	\$ 265.00	38571-25-41-240-51-02
06/01/2006	RODRIGUEZ, CINDY	Collections	REVENUE COLLECTION OFFICER III	Spanish	\$ 451.00	38403-25-48-510-10-02
05/03/2006	RODRIGUEZ, LUIS	Taxpayer Services	REVENUE TAX SPECIALIST III	Spanish	\$ 401.00	38573-25-82-110-51-02
12/14/2020	SILVA, CESAR J	Collections	REVENUE TAX SPECIALIST II	Spanish	\$ 255.00	38572-25-48-100-99-02
08/16/2006	VALDIVIA, MAGDA	Board Of Appeals	REVENUE TAX SPECIALIST III	Spanish	\$ 401.00	38573-25-01-110-11-02
03/03/2025	WHITCHER, ROBERT E.	Taxpayer Services	REVENUE TAX SPECIALIST TRAINEE	Spanish	\$ 260.00	38575-25-82-110-31-02
02/01/2008	ZAMBRANO, RICARDO	Collections	REVENUE COLLECTION OFFICER III	Spanish	\$ 451.00	38403-25-48-530-10-02

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue Auditor III				29	SS		38373-25-41-130-99-02		
3. AGENCY			4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue			Audit/Field Compliance		0	016	2	R	
10. SECTION			11. UNIT			12. TRANSACTION CODE		13. EFFECTIVE DATE	
EXISTING POSITION						<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY		12/16/2023	
NEW/REVISED POSITION						<input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			
Sales and Miscellaneous Taxes			Field – Des Plaines						
14. WORK LOCATION			15. BARGAINING/TERM CODE		RUTAN EXEMPT				
EXISTING POSITION									
NEW/REVISED POSITION									
Cook County			RC062		N				
16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS									
20%	1. Under direction, travels to taxpayer's place of business to conduct highly complex Illinois and/or out-of-state computerized audit assignments of major corporations, large business organizations, multi-national corporations, unitary businesses, partnerships, fiduciary and individual taxpayers subject to all taxes administered by the Illinois Department of Revenue (IDOR): <ul style="list-style-type: none"> Determines proper audit methods, techniques and procedures to pursue in accomplishing audit, including means of verification, test methods and extent of testing Reviews property, payroll and computerized operations for multi-national corporation audits and unitary audits which are inherently complex due to the large amount of assets involved Reaches above shoulder level to top shelves to remove tax related documents necessary to conduct audits Lifts and carries a personal computer and materials weighing up to 50 pounds. 								
20%	2. Examines and analyzes records and accounts to determine compliance or non-compliance with tax rules, regulations and laws: <ul style="list-style-type: none"> Resolves questions of legality in the course of audits 								

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Has authority to require documents be presented to ensure full compliance including Income Tax records and other financial statements and documents • Researches statutes, letters, court rulings, court decisions and other resource material to ensure sound interpretation of each case as it applies to specific audit issues.
15%	<p>3. Serves as an auditor-in-charge, assigning, directing and reviewing the activities of an audit team engaged in conducting complex and large-scale Illinois and out-of-state audits of major companies, partnerships and individual taxpayers:</p> <ul style="list-style-type: none"> • Determines the most appropriate audit procedures • Discusses with auditors the scope and procedures to be followed • Makes preliminary analysis of taxpayer's accounting systems and records to determine most efficient and appropriate methods of obtaining information relative to tax liability • Provides direction to audit team staff in resolving complex or controversial accounting or audit issues • Interprets and clarifies specific sections of tax laws, rules and regulations applicable to given situations • Prepares or reviews completed computerized audit reports applicable to given situations and for legal compliance and certification of accuracy • Signs audit reports prepared by assigned staff incorporating any combination of the several tax acts as indicated.
10%	<p>4. Provides guidance and assistance to less experienced auditors engaged in auditing taxpayer's books and records:</p> <ul style="list-style-type: none"> • Interprets and resolves technical problems in the course of the audit.
10%	<p>5. Translates audit functions/procedures into Spanish for taxpayers and their representatives who cannot speak or read English.</p>
05%	<p>6. Contacts company officials, tax attorneys, or taxpayers' representatives to discuss purpose of and methods and procedures to be employed in making tax audits.</p>
05%	<p>7. Confers with taxpayers or their representatives on tax audit issues and findings:</p> <ul style="list-style-type: none"> • Arranges for and travels to taxpayer's place of business to conduct post-audit conferences to present basis of audit results to taxpayers or their representatives • Presents audit exhibits to substantiate accuracy of audits • Prepares amended returns if overstated or understated liability is disclosed • Endeavors to foster taxpayer's cooperation in agreeing to established liability, in signing amended returns and remitting additional taxes if audits reveal underpayments.
05%	<p>8. Serves as an expert witness at hearings or in court cases of protested liabilities or alleged criminal or civil violations:</p> <ul style="list-style-type: none"> • Presents exhibits and testifies as to the validity and accuracy of audits

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> Works with Attorney General's Office to develop criminal or civil cases.
05%	9. Provides classroom and/or on-the-job training involving new or revised statutes, rules and regulations, IDOR policies and procedures and audit methods and techniques to enhance auditing skills and knowledge to Audit Bureau personnel when requested.
05%	10. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

		WORKING TITLE (IF ANY)
Revenue Audit Supervisor	38369-25-41-130-10-01	
Revenue Audit Supervisor	38369-25-41-130-15-01	
Revenue Audit Supervisor	38369-25-41-130-20-01	
Revenue Audit Supervisor	38369-25-41-130-25-01	
Revenue Audit Supervisor	38369-25-41-130-30-01	
Revenue Audit Supervisor	38369-25-41-130-35-01	
Revenue Audit Supervisor	38369-25-41-130-40-01	
Revenue Audit Supervisor	38369-25-41-130-45-01	
Revenue Audit Supervisor	38369-25-41-130-50-01	
Revenue Audit Supervisor	38369-25-41-130-55-01	

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

Supervisor Lead Worker

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

- Requires possession of a bachelor's degree in accounting, business administration, public administration, business management, business education, economics, mathematics, statistics, or finance with a minimum of fifteen semester hours of progressive coursework in accounting. Requires two years of professional experience as a Revenue Auditor II. -OR- Requires possession of a bachelor's degree with a minimum of fifteen semester hours of progressive coursework in accounting including one class in taxation or auditing and five years of work experience in the Revenue Tax Specialist Series (specifically, one year as a Revenue Tax Specialist Trainee, three years as a Revenue Tax Specialist I and one year as a Revenue Tax Specialist II).

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

2. Requires two years of professional experience as a Revenue Auditor II.
3. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to travel in the performance of duties, with overnight stays as appropriate. Requires appropriate, valid driver's license.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. This position is considered heavy work as defined by the U.S. Department of Labor (20 CFR 404.1567(d)). Heavy work involves lifting no more than 100 pounds at a time with frequent lifting or carrying of objects weighing up to 50 pounds.
5. Requires ability to lift and carry work above shoulder level to place on or remove from shelves.
6. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.


21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, thirteen holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Raven DeV Vaughn by Angela M. Lyerla 1/18/24</i>			12/27/2023

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE COLLECTION OFFICER III-Spanish	REVENUE COLLECTION OFFICER III-SPANISH SPEAKING	Spanish	None	90678235	38403-25-48-510-10-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Collections-48	Collections Field Compliance-500		Collections Field Compliance/ District 13 - Des Plaines-510	2025-01-07
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Des Plaines - 9511 W Harrison Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

25	<p>1. Under direction, as a senior level collection officer with responsibility for an assigned territory, conducts field collection activities:</p> <ul style="list-style-type: none"> • Confers in English and/or Spanish by telephone, correspondence and/or in person in the office/walk-in area or designated meeting location with taxpayers, their representatives and/or others to make demand for payment or filing of missing returns. • Collects delinquent taxes, secures delinquent tax returns, and determines taxpayer compliance with various tax laws. • Accesses collection cases within GenTax in a manner prescribed by management including but not limited to work queues, direct assignment, spreadsheets, etc. • Utilizes GenTax tax system to document activities related to collection cases including taxpayers contacted, monies/returns collected, demands made, etc. • Conducts special investigations of a sensitive nature. • Gives sworn testimony at hearings. • Recommends appropriate courses of action if the taxpayer has not been brought into compliance. • Provides technical assistance or guidance on tax preparation. • Makes field calls in high risk areas on taxpayers who may be antagonistic, potentially dangerous, under extreme emotional distress if unable to achieve resolution through other collection efforts. • Assists other staff in collecting delinquent taxes when the lower-level collector is unable to collect, or unavailable. • Participates in high profile compliance procedures, e.g., seizures. • Serves as liaison with sheriff or state police on seizure cases. • Travels in the performance of duties, when necessary.
25	<p>2. Locates evasive taxpayers through personal contacts, tracing by various sources including building agents, neighbors, Federal, State, and local agencies, employers and others:</p> <ul style="list-style-type: none"> • Searches public records to locate individuals and business entities. • Utilizes computer systems and on-line tools to research and locate evasive taxpayers.
20	<p>3. Serves as training officer for lower-level collectors:</p> <ul style="list-style-type: none"> • Participates in on-the-job training programs designed to provide lower-level collectors with instructions on tax laws, agency rules and regulations, report preparation, work procedures and methods and collection techniques. • As part of the training program, conducts on-site collection assignments in order to provide new collectors with work experience in applying the skills and knowledges acquired during the training period. • Monitors the training and progress of new employees and frequently provides advice and assistance on the successful completion of assignments. • Provides input in evaluating new employees during and at the completion of their training period. • Travels in the performance of duties, when necessary.
10	<p>4. In absence of supervisor, or at supervisor's request, reviews, approves or disapproves field collector's progress:</p> <ul style="list-style-type: none"> • Reviews progress and final collection reports for completeness and adequacy of data, e.g., total amount of money collected is correct, supporting documents and evidence are consistent and complete, accuracy of final payment plans, recommended disposition of cases are in good order, etc. • Approves or disapproves final reports and/or forwards questionable cases wherein the disposition of case may not be clear to supervisor and forwards all recommendations for closing of cases when further collection activity would be futile or costly to IDOR to supervisor for final decision. • Confers with lower-level collectors and advises them of errors made and recommends the proper course of action to correct reports. • In absence of supervisor, or at supervisor's request, review daily field reports for accuracy of information, e.g., mileage, meals, lodging, parking fees, etc. • Approves daily field reports before vouchers for reimbursements are prepared.
10	<p>5. Attends and participates in District and Regional Office meetings:</p> <ul style="list-style-type: none"> • Assists in planning, developing and implementing new or revised methods, procedures, standards, and techniques. • Apprises District Office staff of new or revised statutes and other programs mandated by legislature. • Identifies training needs of field staff and participates in formal training programs.
5	<p>6. In absence of supervisor, or at supervisor's request, assists in a variety of administrative duties, e.g., conducts special studies of operations and compiles and prepares recommendations for changes in procedures to facilitate work in the office:</p> <ul style="list-style-type: none"> • Compiles and prepares special production, activity, and statistical reports.
5	<p>7. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.</p>
	8.
	9.
	10.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677865	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill and mental development equivalent to completion of four years of college.
2. Requires four years of professional experience in the delinquent tax collection field including two years of experience as a Revenue Collection Officer II.
3. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to travel in the performance of duties, with overnight stays as appropriate. Requires appropriate, valid driver's license.
3. Requires access to an automobile.
4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
5. Overtime is a condition of employment, and you may be requested or required to work overtime including scheduled, unscheduled, or last-minute overtime. This may require the ability to work evenings and weekends.
6. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE COLLECTION OFFICER III-Spanish	REVENUE COLLECTION OFFICER III-SPANISH SPEAKING	Spanish	None	90678237	38403-25-48-530-10-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Collections-48	Collections Field Compliance-500		Collections Field Compliance/ District 2 - Des Plaines-530	2025-01-07
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Des Plaines - 9511 W Harrison Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

25	<p>1. Under direction, as a senior level collection officer with responsibility for an assigned territory, conducts field collection activities:</p> <ul style="list-style-type: none"> • Confers in English and/or Spanish by telephone, correspondence and/or in person in the office/walk-in area or designated meeting location with taxpayers, their representatives and/or others to make demand for payment or filing of missing returns. • Collects delinquent taxes, secures delinquent tax returns, and determines taxpayer compliance with various tax laws. • Accesses collection cases within GenTax in a manner prescribed by management including but not limited to work queues, direct assignment, spreadsheets, etc. • Utilizes GenTax tax system to document activities related to collection cases including taxpayers contacted, monies/returns collected, demands made, etc. • Conducts special investigations of a sensitive nature. • Gives sworn testimony at hearings. • Recommends appropriate courses of action if the taxpayer has not been brought into compliance. • Provides technical assistance or guidance on tax preparation. • Makes field calls in high risk areas on taxpayers who may be antagonistic, potentially dangerous, under extreme emotional distress if unable to achieve resolution through other collection efforts. • Assists other staff in collecting delinquent taxes when the lower-level collector is unable to collect, or unavailable. • Participates in high profile compliance procedures, e.g., seizures. • Serves as liaison with sheriff or state police on seizure cases. • Travels in the performance of duties, when necessary.
25	<p>2. Locates evasive taxpayers through personal contacts, tracing by various sources including building agents, neighbors, Federal, State, and local agencies, employers and others:</p> <ul style="list-style-type: none"> • Searches public records to locate individuals and business entities. • Utilizes computer systems and on-line tools to research and locate evasive taxpayers.
20	<p>3. Serves as training officer for lower-level collectors:</p> <ul style="list-style-type: none"> • Participates in on-the-job training programs designed to provide lower-level collectors with instructions on tax laws, agency rules and regulations, report preparation, work procedures and methods and collection techniques. • As part of the training program, conducts on-site collection assignments in order to provide new collectors with work experience in applying the skills and knowledges acquired during the training period. • Monitors the training and progress of new employees and frequently provides advice and assistance on the successful completion of assignments. • Provides input in evaluating new employees during and at the completion of their training period. • Travels in the performance of duties, when necessary.
10	<p>4. In absence of supervisor, or at supervisor's request, reviews, approves or disapproves field collector's progress:</p> <ul style="list-style-type: none"> • Reviews progress and final collection reports for completeness and adequacy of data, e.g., total amount of money collected is correct, supporting documents and evidence are consistent and complete, accuracy of final payment plans, recommended disposition of cases are in good order, etc. • Approves or disapproves final reports and/or forwards questionable cases wherein the disposition of case may not be clear to supervisor and forwards all recommendations for closing of cases when further collection activity would be futile or costly to IDOR to supervisor for final decision. • Confers with lower-level collectors and advises them of errors made and recommends the proper course of action to correct reports. • In absence of supervisor, or at supervisor's request, review daily field reports for accuracy of information, e.g., mileage, meals, lodging, parking fees, etc. • Approves daily field reports before vouchers for reimbursements are prepared.
10	<p>5. Attends and participates in District and Regional Office meetings:</p> <ul style="list-style-type: none"> • Assists in planning, developing and implementing new or revised methods, procedures, standards, and techniques. • Apprises District Office staff of new or revised statutes and other programs mandated by legislature. • Identifies training needs of field staff and participates in formal training programs.
5	<p>6. In absence of supervisor, or at supervisor's request, assists in a variety of administrative duties, e.g., conducts special studies of operations and compiles and prepares recommendations for changes in procedures to facilitate work in the office:</p> <ul style="list-style-type: none"> • Compiles and prepares special production, activity, and statistical reports.
5	<p>7. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.</p>
	8.
	9.
	10.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677866	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill and mental development equivalent to the completion of four years of college.
2. Requires four years of professional experience in the delinquent tax collection field including two years of experience as a Revenue Collection Officer II.
3. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to travel in the performance of duties, with overnight stays as appropriate. Requires appropriate, valid driver's license.
3. Requires access to an automobile.
4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
5. Overtime is a condition of employment, and you may be requested or required to work overtime including scheduled, unscheduled, or last-minute overtime. This may require the ability to work evenings and weekends.
6. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST I-Spanish	FEDERAL/ STATE EXCHANGE UNIT SPECIALIST I- SPANISH SPEAKING (REVENUE TAX SPECIALIST I- Spanish Speaking)	Spanish	None	90678296	38571-25-41-240-51-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	Yes	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Audit-41	Discovery & Recovery/Lifestyle/ Nexus/Discovery-240		Federal/State Exchange-51	2025-03-18
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Sangamon	Springfield - 101 W Jefferson St	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

20	<p>1. Under general supervision, responds to inquiries from taxpayers and Illinois Department of Revenue (IDOR) employees regarding status of cases and other accounts, assessments, statutes of limitation, statutory notices, application of laws, rules, regulations, letter rulings, legal opinions, policies and procedures, claims, refund inquiries, interest computations, penalties, etc., in resolving audits, limited scope assignments, compliance projects, hearing cases, etc.:</p> <ul style="list-style-type: none"> • Determines nature of inquiries. • Researches IDOR records or applicable regulatory references to resolve issues or to provide general information concerning laws, procedures and practices.
20	<p>2. Provides information, assistance, and instruction in English and/or Spanish to taxpayers and/or their representatives as it relates to the tax laws administered by IDOR, tax filing requirements, and IDOR policies and procedures:</p> <ul style="list-style-type: none"> • Assists taxpayers in preparing tax returns including all attachments. • Compiles information and completes claims for property tax relief. • Provides tax forms, brochures, publications, and documents requested by taxpayers. • Explains filing and payment procedures.
15	<p>3. Examines and analyzes Internal Revenue Service (IRS) and other state audit reports to determine effects on Illinois returns:</p> <ul style="list-style-type: none"> • Compares federal and state income records of taxpayers. • Researches IDOR records, taxpayer records, return copies, etc. • Evaluates whether adjustments are accurately reported, and if not, calculates tax liability and prepares necessary documentation using both computer software and manual methods. • Reviews report content for accuracy and proper application of regulations, laws, and procedures. • Analyzes and processes responses and documents from taxpayers to notices for accuracy, validity and appropriateness. • Prepares original or amended returns calculating penalty and interest, processes remittance, etc.
15	<p>4. Provides tax and tax related advice and assistance to taxpayers and IDOR personnel on routine and involved technical and/or procedural problems in reviewing Revenue Agent Reports, Federal/State Exchange accounts, audit files, Board of Appeals petitions, claims for credit, various tax returns etc.:</p> <ul style="list-style-type: none"> • Answers taxpayer inquiries in English and/or Spanish while adhering to the strict security and confidentiality of all state and federal tax information in accordance with disclosure law.
10	<p>5. Reviews completed accounts and conducts in-depth analysis of cases identifying methods used and any special or unique issues in review:</p> <ul style="list-style-type: none"> • Researches IDOR records verifying account was completed properly and accurately. • Analyzes work papers and verifies conclusions are substantiated and properly reflected. • Confirms legality by ensuring documents are properly signed, completed and amount of taxes, penalties and interest agree and are within statutory periods. • Detects additional monies due or owed, legal, procedural and/or mathematical errors. • Maintains and prepares statistics, records, inventories, reports, manuals and files as directed by management. • Lifts and carries tubs of work weighing up to 25 pounds.
10	<p>6. Determines proper method to implement audit results, legal settlements, hearing decisions, etc., into the computer system:</p> <ul style="list-style-type: none"> • Prepares line instructions on changes made in the account. • Determines penalty and interest dates. • Computes penalty and interest amounts, and forwards for processing. • Refers to tax act, regulations, package X, etc. • Prepares adjustment forms to post checks timely and routes completed forms with remittance, prepares forms to release funds, etc.
5	<p>7. Participates in special assignments of a technical or specialized tax nature:</p> <ul style="list-style-type: none"> • Serves as a member of a test team. • Provides input in developing new and revised procedures relating to specific programs. • Attends and participates in professional and technical development workshops, training sessions/courses, and discussions to enhance skills, knowledge, and compliance. • Assists higher level staff in resolving technical, mathematical, and procedural issues.
5	<p>8. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.</p>
	<p>9.</p>
	<p>10.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677826	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires successful completion of the Revenue Tax Specialist Trainee program, which entails 12 months of agency training, and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. This position has been found to meet the requirements in section 4A-101 of the Illinois Governmental Ethics Act requiring the occupant/employee to file a Statement of Economic Interest. The Illinois Governmental Ethics Act (5 ILCS 420/4A et seq.) requires certain state officials and employees to file annual Statements of Economic Interest with the Office of the Secretary of State that will be made available for examination and copying by the public. All employees required to file a Statement of Economic Interest are also required to file the Supplemental Statement of Economic Interest with the Executive Ethics Commission. (See Executive Order 15-09) Fines and penalties apply to untimely filings.
5. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1. POSITION TITLE		WORKING TITLE (IF ANY)	BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue Tax Specialist I			29	SS		38571-25-48-100-99-02		
3. AGENCY		4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION								
NEW/REVISED POSITION								
Revenue		Collections		0	084	2	R	
10. SECTION		11. UNIT		12. TRANSACTION CODE			13. EFFECTIVE DATE	
EXISTING POSITION				<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			09/01/2023	
NEW/REVISED POSITION								
14. WORK LOCATION		15. BARGAINING/TERM CODE		RUTAN EXEMPT				
EXISTING POSITION								
NEW/REVISED POSITION		RC062		N				
Sangamon County								
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS							
25%	<p>1. Under general supervision, confers by telephone, correspondence and/or in person, in English and/or Spanish, with taxpayers and/or their representatives to make demand for payment or filing of missing returns and/or debt:</p> <ul style="list-style-type: none"> Provides assistance, guidance in preparing tax returns, and resolving inquiries and complaints from stakeholders dealing with routine tax issues, tax laws, rules and regulations Explains issues, court decisions, tax laws and the Illinois Department of Revenue's (IDOR's) position with respect to accounts in question Ascertains the status of accounts and independently explains IDOR's actions, policies and requirements to taxpayers or their representatives Sets up and attends meetings with taxpayers located in-state and out-of-state. 							
20%	<p>2. Receives, reviews and analyzes routine in-state and out-of-state accounts assigned by the tax system, referred from other enforcement programs or other state agencies, involving the various taxes administered by the Illinois Department of Revenue (IDOR), to determine the most appropriate collection action to secure delinquent tax returns, taxpayer compliance and taxpayer debt in a cost-efficient manner, e.g., bank levy, wage levy, license revocations, etc.:</p> <ul style="list-style-type: none"> Verifies taxpayer financial information via the IDOR's tax systems 							

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Analyzes, determines and documents adjustments required • Initiates liens if applicable • Monitors statues as needed to ensure proper procedures are being followed • Notifies taxpayers of tax liability with bulk sales stop orders • Files bankruptcy claims with the applicable court to indicate amount of debt owed by the debtor • Performs routine analysis of the tax returns, files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt • Performs routine and involved analysis of accounts being reviewed for specific enforcement actions • Accesses cases in IDOR Tax System and documents all pertinent information relative to the collection case • Lifts and carries tubs containing tax documents weighing up to 25 lbs.
20%	<p>3. Utilizes GenTax, or other PC systems, to access delinquent taxpayer cases while conferring by telephone, correspondence, and/or in person:</p> <ul style="list-style-type: none"> • Reviews and analyzes IDOR Tax System and/or other applications available to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case • Analyzes information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action • Takes enforcement action as required (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.) • Records in the applicable system any action taken by using comments • Obtains and documents financial, asset, secondary or other information regarding a taxpayer case • Utilizes GenTax to reschedule cases • Generates correspondence, by selecting the assessment and delinquency detail, and any variable information needed to construct the document desired • Identifies the location of the collection case in the tax system and interprets the collection efforts being taken in order to assist the taxpayer • Takes the appropriate collection action necessary for tax compliance.
05%	<p>4. Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period:</p> <ul style="list-style-type: none"> • Reschedules or transfers the case accordingly to the applicable collection enforcement area or Supervisor as needed.
05%	<p>5. Recommends various courses of action; in English and/or Spanish, to taxpayers, higher level staff, and managers in order to resolve collection cases:</p>

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS	
	<ul style="list-style-type: none"> • Determines responsibility and issues penalties • Recommends transfer of corporate debt to responsible officers • Determines extension of time for tax payments and closing of cases determined to be un-collectible • Recommends disposition of cases supported by documented information and evidence • Compiles and prepares protest packages to support-department hearings. 	
05%	6.	Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems: <ul style="list-style-type: none"> • Provides input during the development of new or revised tax forms and other tax related material.
05%	7.	Confers with supervisor relative to new or revisions in tax laws and other regulatory material.
05%	8.	Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.
05%	9.	As part of an on-the-job learning process, assists in processing the more difficult/complex tax account cases.
05%	10.	Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.
17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)		
		WORKING TITLE (IF ANY)
Public Service Administrator	37015-25-48-210-00-01	
Public Service Administrator	37015-25-48-220-00-01	
Public Service Administrator	37015-25-48-220-10-01	
Public Service Administrator	37015-25-48-240-00-01	
Public Service Administrator	37015-25-48-245-00-01	
Public Service Administrator	37015-25-48-260-00-01	
Public Service Administrator	37015-25-48-270-00-01	
Public Service Administrator	37015-25-48-280-00-01	
Public Service Administrator	37015-25-48-290-00-01	
Public Service Administrator	37015-25-48-291-00-01	
Public Service Administrator	37015-25-48-292-00-01	
Public Service Administrator	37015-25-48-293-00-01	
Public Service Administrator	37015-25-48-294-00-01	
Public Service Administrator	37015-25-48-300-00-01	
Public Service Administrator	37015-25-48-310-00-01	
Public Service Administrator	37015-25-48-330-00-01	

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

Supervisor Lead Worker

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires successful completion of the Revenue Tax Specialist Trainee program, which entails 12 months of agency training, and either: knowledge, skill, and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.


21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, thirteen holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<i>Raven DeVaughn by Angela M. Lyster 10/12/23</i>			08/31/2023

1. POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST I-Spanish	REVENUE TAX SPECIALIST I (Customer Service Specialist I Spanish Speaking)	Spanish	None	90678325	38571-25-82-110-51-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Customer Service-82	Taxpayer Assistance-110		Chicago Field Office-50	2024-07-29
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Chicago - 555 West Monroe Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				
35	<p>1. Under general supervision, reviews, analyzes and adjusts routine and highly technical original and amended tax returns, schedules, and supporting documentation:</p> <ol style="list-style-type: none"> 1. Reviews and verifies computer generated notices, correspondence, manual and automated account records, priority accounts, legislative referrals, disputed billings, reasonable cause requests, and other documents of increasing difficulty for compliance with tax laws, rules and regulations, mathematical, technical and procedural accuracy. 2. Makes factual and technical determinations and initiates manual or automated corrective, adjustments, edit and billing action to resolve discrepancies and deficiencies to allow the processing system to accept the return. 3. Reviews and analyzes routine and priority tax correspondence directed to the Customer Service Bureau from outside sources and Illinois Department of Revenue (IDOR) officials to determine nature and content. 4. Executes priority adjustments and/or responds to priority referrals if adjustments cannot be completed based on statutes, rules, etc. 5. Reviews and verifies account status and receipted payments to requesting parties. 6. Performs research on computer records, files and other resource material to determine nature of inquiry, e.g., filing requirements, account status information, billing problems, accounts receivable, interpretation of laws or rules, etc. 7. Maintains a variety of production and telephone logs, document inventory and reports. 8. Receives advanced on-the-job training to enhance technical skills in processing non-routine and highly technical amended tax returns, schedules and supporting documentation, computer generated notices, correspondence, manual and automated account records, priority accounts, legislative referrals, disputed billings, reasonable cause requests and other documents of increasing difficulty for compliance with current tax laws, rules and regulations, mathematical, technical and procedural accuracy. 9. Walks, stands, bends, reaches above shoulder level and lifts and carries tax documents weighing up to 25 pounds in the performance of duties. 10. Travels in the performance of duties. 				

30	<p>2. Reviews and performs research on various source documents in providing information, guidance and assistance to Illinois and out-of-state taxpayers and/or their representatives, in writing and orally in English and Spanish of a routine and priority nature, relating to the various taxes administered by IDOR in addition to interpretation of the Illinois Business Registration, and Electronic Filing Application rules and regulations:</p> <ol style="list-style-type: none"> 1. Provides technical assistance to individual taxpayers or their representatives, both orally and in writing, in English and Spanish by providing information, assistance, and guidance on laws, rules and regulations, and IDOR policies and procedures as relates to all tax acts or IDOR programs. 2. Assists taxpayers and/or their representatives in preparing registration forms, general, amended, supplemental and delinquent tax returns, including documents for individuals, partnerships, corporations, partnerships, estates, trusts and fiduciaries regarding account status, laws administered by IDOR, additional documentation or forms needed to resolve discrepancies answering technical inquiries and balances owed, etc. of a progressively difficult nature. 3. Registers and maintains business tax accounts and reviews and analyzes routine and priority tax correspondence. 4. Initiates corrective action to resolve inquiries. 5. Refers more difficult and complex cases to supervisor.
10	<p>3. Performs research necessary to resolve discrepancies or deficiencies:</p> <ol style="list-style-type: none"> 1. Determines progressively difficult research methods necessary for resolution of discrepancies or deficiencies in order to adjust taxpayer accounts. 2. Performs research on all resources available to determine corrective action to be taken. 3. Reconstructs taxpayer history. 4. Performs research on historical documents, statutes and rules to determine validity and accuracy of returns and assessments.
10	<p>4. Confers with and initiates correspondence to taxpayers and/or their representatives in English and Spanish on status of accounts and to determine the nature of inquiries, problems or complaints:</p> <ol style="list-style-type: none"> 1. Initiates oral and/or written communication in English and Spanish to taxpayers and their representatives regarding account status, laws administered by IDOR, additional documentation or forms needed to resolve discrepancies, balances owed, etc. 2. Gives advice in English and Spanish regarding appropriate action to be taken to be in compliance. 3. Prepares documentation to change tax liability, penalty and interest. 4. Provides necessary forms to taxpayers.
5	<p>5. Assigned throughout the Customer Service Bureau to assist in higher level tax related duties as required:</p> <ol style="list-style-type: none"> 1. Assigned to other areas of the Customer Service Bureau to assist in workload demands as part of the developmental phase. 2. Serves as a member of special project or test teams. 3. Assists field auditors and/or field collectors on a limited or as needed basis by providing information relative to status of accounts, filing status, etc.
5	<p>6. Approves or denies progressively difficult reasonable cause requests based on procedural and statutory guidelines:</p> <ol style="list-style-type: none"> 1. Utilizes the current tax operating systems to approve or deny abatement of penalties and/or interest. 2. Requests additional information from taxpayers and/or their representatives in order to approve or deny reasonable cause. 3. Performs increasingly difficult manual and/or automated mathematical calculations and procedures in computing tax liability and applicable penalty and interest, disallowed discounts or modifications, canceling all or portions of assessments and/or bills, and allocation of revenues in accordance with statutes outlining these processes. 4. Explains in English and Spanish computations and methods (not account specific) to taxpayers and/or their representatives. 5. Informs taxpayers and their representatives of the decision rendered in English and Spanish.
5	<p>7. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>
	8.
	9.
	10.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677891	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires successful completion of the Revenue Tax Specialist Trainee program, which entails 12 months of agency training, and either: knowledge, skill, and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to travel in the performance of duties, with overnight stays as appropriate. Requires appropriate, valid driver's license.
3. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, table, etc.
5. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1. POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST II-Spanish	Collections Tax Specialist II – Spanish Speaking (REVENUE TAX SPECIALIST II)	Spanish	None	90678341	38572-25-48-100-99-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Collections-48	Collections RTS Pool-100			2024-12-05
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Sangamon	Springfield - 101 W Jefferson St	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				
20	<p>1. Under general direction, receives, reviews and analyzes problematic, non-routine and highly technical in-state and out-of-state accounts assigned by the GenTax System, or referred from other enforcement programs and State Agencies, involving the various taxes and/or debt administered by the Illinois Department of Revenue (IDOR), to determine the most appropriate collection action to secure delinquent tax returns, debt payment and taxpayer compliance in a cost efficient manner, e.g., bank levy, wage levy, license revocation, etc.:</p> <ul style="list-style-type: none"> • Verifies taxpayer financial information via IDOR's tax systems. • Analyzes, determines and documents adjustments required for all major tax systems. • Initiates liens and monitors statutes. • Issues bulk sales stop orders and files bankruptcy claims. • Performs a technical analysis of the tax returns, audit files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt. • Performs an in-depth analysis of accounts being reviewed for specific enforcement actions. • Accesses the case in GenTax and documents all pertinent information. • Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period. • Reschedules or transfers the case, as necessary. • Lifts and carries tubs containing tax documents weighing up to 25 pounds. 				
20	<p>2. Writes and speaks in English and/or Spanish to confers by telephone, correspondence and or in person with taxpayers, their representatives and/or others to make demand for payment of taxes or debt, or filing of missing returns:</p> <ul style="list-style-type: none"> • Provides technical assistance or guidance in preparing tax returns or resolving inquiries or complaints dealing with highly technical tax issues, tax laws, rules and regulations. • Explains issues, court decisions, tax laws and IDOR's position with respect to the account. • Sets up and attends meetings with taxpayers located in-state and out-of-state. 				

20	<p>3. Utilizes GenTax, or other personal computer (PC) systems, to access delinquent taxpayer cases:</p> <ul style="list-style-type: none"> • Reviews and analyzes on-line information to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case. • Analyzes the on-line information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action. • Takes the appropriate action (i.e., collect in full, recommend adjustment or suspense). • Takes enforcement action as required (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.). • Records in the applicable system any action taken by using comments. • Obtains and documents financial, asset, secondary or other information regarding a taxpayer case. • Utilizes GenTax to reschedule the case. • Generates correspondence, by selecting the assessment and delinquency detail, and any variable information needed to construct the document. • On taxpayer initiated contacts, accesses the case in GenTax, analyzes the case as documented above. • Determines where the case is residing and understands the type of action being taken by that location. • Recommends and/or takes the appropriate collection action. • Assists taxpayers in resolving collection issues.
10	<p>4. Recommends various courses of action:</p> <ul style="list-style-type: none"> • Determines responsibility and issues penalties, transferring corporate debt to responsible officers. • Determines extension of time for tax payments and closing of cases determined to be un-collectible. • Recommends disposition of cases supported by documented information and evidence. • Compiles and prepares protest packages to support IDOR hearings.
10	<p>5. Provides assistance to lower-level Revenue Tax Specialists and Trainees performing similar but less complicated work:</p> <ul style="list-style-type: none"> • Participates in the training of new employees on the various taxes, GenTax and the operations of the Program Area. • Makes recommendations to revise operating procedures when applicable.
05	<p>6. Participates in staff meetings:</p> <ul style="list-style-type: none"> • Assists supervisor in the development of new and/or revised operating policies and procedures, staffing requirements, work schedules, etc., recommending changes in procedures to expedite workflow, etc., and implements changes upon approval by management.
05	<p>7. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems:</p> <ul style="list-style-type: none"> • Assists in writing processing methods and procedures.
05	<p>8. Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.</p>
05	<p>9. Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.</p>
	<p>10.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677849	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires three years of experience as a Revenue Tax Specialist I with the Illinois Department of Revenue and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1. POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST II- Spanish	Collections Tax Specialist II – Spanish Speaking (REVENUE TAX SPECIALIST II)	Spanish	None	90678341	38572-25-48-100-99-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Collections-48	Collections RTS Pool-100			2024-12-05
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Sangamon	Springfield - 101 W Jefferson St	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				
20	<p>1. Under general direction, receives, reviews and analyzes problematic, non-routine and highly technical in-state and out-of-state accounts assigned by the GenTax System, or referred from other enforcement programs and State Agencies, involving the various taxes and/or debt administered by the Illinois Department of Revenue (IDOR), to determine the most appropriate collection action to secure delinquent tax returns, debt payment and taxpayer compliance in a cost efficient manner, e.g., bank levy, wage levy, license revocation, etc.:</p> <ul style="list-style-type: none"> • Verifies taxpayer financial information via IDOR's tax systems. • Analyzes, determines and documents adjustments required for all major tax systems. • Initiates liens and monitors statutes. • Issues bulk sales stop orders and files bankruptcy claims. • Performs a technical analysis of the tax returns, audit files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt. • Performs an in-depth analysis of accounts being reviewed for specific enforcement actions. • Accesses the case in GenTax and documents all pertinent information. • Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period. • Reschedules or transfers the case, as necessary. • Lifts and carries tubs containing tax documents weighing up to 25 pounds. 				
20	<p>2. Writes and speaks in English and/or Spanish to confers by telephone, correspondence and or in person with taxpayers, their representatives and/or others to make demand for payment of taxes or debt, or filing of missing returns:</p> <ul style="list-style-type: none"> • Provides technical assistance or guidance in preparing tax returns or resolving inquiries or complaints dealing with highly technical tax issues, tax laws, rules and regulations. • Explains issues, court decisions, tax laws and IDOR's position with respect to the account. • Sets up and attends meetings with taxpayers located in-state and out-of-state. 				

20	<p>3. Utilizes GenTax, or other personal computer (PC) systems, to access delinquent taxpayer cases:</p> <ul style="list-style-type: none"> • Reviews and analyzes on-line information to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case. • Analyzes the on-line information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action. • Takes the appropriate action (i.e., collect in full, recommend adjustment or suspense). • Takes enforcement action as required (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.). • Records in the applicable system any action taken by using comments. • Obtains and documents financial, asset, secondary or other information regarding a taxpayer case. • Utilizes GenTax to reschedule the case. • Generates correspondence, by selecting the assessment and delinquency detail, and any variable information needed to construct the document. • On taxpayer initiated contacts, accesses the case in GenTax, analyzes the case as documented above. • Determines where the case is residing and understands the type of action being taken by that location. • Recommends and/or takes the appropriate collection action. • Assists taxpayers in resolving collection issues.
10	<p>4. Recommends various courses of action:</p> <ul style="list-style-type: none"> • Determines responsibility and issues penalties, transferring corporate debt to responsible officers. • Determines extension of time for tax payments and closing of cases determined to be un-collectible. • Recommends disposition of cases supported by documented information and evidence. • Compiles and prepares protest packages to support IDOR hearings.
10	<p>5. Provides assistance to lower-level Revenue Tax Specialists and Trainees performing similar but less complicated work:</p> <ul style="list-style-type: none"> • Participates in the training of new employees on the various taxes, GenTax and the operations of the Program Area. • Makes recommendations to revise operating procedures when applicable.
05	<p>6. Participates in staff meetings:</p> <ul style="list-style-type: none"> • Assists supervisor in the development of new and/or revised operating policies and procedures, staffing requirements, work schedules, etc., recommending changes in procedures to expedite workflow, etc., and implements changes upon approval by management.
05	<p>7. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems:</p> <ul style="list-style-type: none"> • Assists in writing processing methods and procedures.
05	<p>8. Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.</p>
05	<p>9. Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.</p>
	<p>10.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677849	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires three years of experience as a Revenue Tax Specialist I with the Illinois Department of Revenue and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	POSITION NUMBER	LEGACY POSITION NUMBER	AGENCY SPECIFIC POSITION CODE
REVENUE TAX SPECIALIST II-Spanish	Collections Tax Specialist II-Spanish Speaking (REVENUE TAX SPECIALIST II-Spanish Speaking)	Spanish	None	90678355	38572-25-48-570-20-02	38572-25-48-570-20-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	EXMT CODE	SITE	POSITION TYPE	MI	TARGET FTE
false	No	Not Exempt	In-Office	SP	true	2
AGENCY	DIVISION	SECTION		UNIT	EFFECTIVE DATE	
Department of Revenue	Collections-48	Collections Field Compliance-500		Collections Field Compliance/ District 16/ Chicago- 570	2025.12.17	
WORK COUNTY	WORK LOCATION	BARGAINING CODE	JOB PROTECTED	ALTERNATE RATE OF PAY	MERIT COMP CODE	
Cook	Chicago - 555 W Monroe St	USA/RC062	Yes	N		
% OF TIME	COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS					
20	<p>1. Under general direction, receives, reviews and analyzes problematic, non-routine and highly technical in-state and out-of-state accounts assigned by the GenTax System, or referred from other enforcement programs and State Agencies, involving the various taxes and/or debt administered by the Illinois Department of Revenue (IDOR), to determine the most appropriate collection action to secure delinquent tax returns, debt payment and taxpayer compliance in a cost efficient manner, e.g., bank levy, wage levy, license revocation, etc.:</p> <ul style="list-style-type: none"> • Verifies taxpayer financial information via GenTax. • Analyzes, determines and documents adjustments required for all major tax systems. • Initiates liens and monitors statutes. • Performs a technical analysis of tax returns, audit files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt. • Performs an in-depth analysis of accounts being reviewed for specific enforcement actions. • Accesses cases in GenTax and documents all pertinent information. • Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period. • Reschedules or transfers cases, as necessary. • Lifts and carries tubs containing tax documents weighing up to 25 pounds. 					
20	<p>2. Confers in English or Spanish by telephone, correspondence and or in person with taxpayers, their representatives and/or others to make demand for payment of taxes or debt, or filing of missing returns:</p> <ul style="list-style-type: none"> • Provides technical assistance and guidance in preparing tax returns, and resolving inquiries and complaints dealing with highly technical tax issues, tax laws, rules and regulations. • Explains, in English or Spanish, issues, court decisions, tax laws and IDOR's position with respect to accounts in question. • Sets up and attends meetings with taxpayers located in-state and out-of-state. 					

20	3. Utilizes GenTax, or other computer systems, to access delinquent taxpayer cases: <ul style="list-style-type: none"> • Reviews and analyzes on-line information to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case. • Analyzes the on-line information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action. • Takes the appropriate collection action, (i.e., collect in full, recommends adjustment or suspense). • Takes enforcement action as required, (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.). • Records in the applicable system any action taken by using comments. • Obtains and documents financial, asset, secondary or other information regarding taxpayer cases. • Utilizes GenTax to reschedule cases. • Generates correspondence, by selecting the assessment and delinquency detail, and any variable information needed to construct the document. • On taxpayer initiated contacts, accesses the case in GenTax, analyzes the case as documented above. • Identifies the location of a collection case in GenTax and interprets the collection efforts being taken in order to assist the taxpayer. • Takes and recommends the appropriate collection action for tax compliance.
10	4. Recommends various courses of action to taxpayers, higher level staff, and managers in order to resolve collection cases: <ul style="list-style-type: none"> • Determines responsibility and issues penalties. • Transfers corporate debt to responsible officers. • Determines extension of time for tax payments and closing of cases determined to be un-collectible. • Recommends disposition of cases supported by documented information and evidence. • Compiles and prepares protest packages to support IDOR hearings.
10	5. Assists in preparation of training materials and mentors lower-level staff: <ul style="list-style-type: none"> • Assists in preparation of materials used in training new and lower-level employees. • Mentors new or lower-level employees in work processes. • Makes recommendations to revise operating procedures when applicable.
5	6. Participates in staff meetings: <ul style="list-style-type: none"> • Assists supervisor in the development of new and/or revised operating policies and procedures, staffing requirements, work schedules, etc., recommending changes in procedures to expedite workflow, etc., and implements changes upon approval by management.
5	7. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems: <ul style="list-style-type: none"> • Assists in writing processing methods and procedures.
5	8. Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.
5	9. Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.
	10.

POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677871	PUBLIC SERVICE ADMINISTRATOR

CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires three years of experience as a Revenue Tax Specialist I with the Illinois Department of Revenue and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)Specialized Skills (Used for certain BU Employees only)**CONDITIONS OF EMPLOYMENT**

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

COMMENTS

12/17/25 - PUC#90678357 merged into this position - aml

POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	POSITION NUMBER	LEGACY POSITION NUMBER	AGENCY SPECIFIC POSITION CODE
REVENUE TAX SPECIALIST II-Spanish	Collections Tax Specialist II-Spanish Speaking (REVENUE TAX SPECIALIST II-Spanish Speaking)	Spanish	None	90678355	38572-25-48-570-20-02	38572-25-48-570-20-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	EXMT CODE	SITE	POSITION TYPE	MI	TARGET FTE
false	No	Not Exempt	In-Office	SP	true	2
AGENCY	DIVISION	SECTION		UNIT	EFFECTIVE DATE	
Department of Revenue	Collections-48	Collections Field Compliance-500		Collections Field Compliance/District 16/Chicago- 570	2025.12.17	
WORK COUNTY	WORK LOCATION	BARGAINING CODE	JOB PROTECTED	ALTERNATE RATE OF PAY	MERIT COMP CODE	
Cook	Chicago - 555 W Monroe St	USA/RC062	Yes	N		
% OF TIME	COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS					
20	<p>1. Under general direction, receives, reviews and analyzes problematic, non-routine and highly technical in-state and out-of-state accounts assigned by the GenTax System, or referred from other enforcement programs and State Agencies, involving the various taxes and/or debt administered by the Illinois Department of Revenue (IDOR), to determine the most appropriate collection action to secure delinquent tax returns, debt payment and taxpayer compliance in a cost efficient manner, e.g., bank levy, wage levy, license revocation, etc.:</p> <ul style="list-style-type: none"> • Verifies taxpayer financial information via GenTax. • Analyzes, determines and documents adjustments required for all major tax systems. • Initiates liens and monitors statutes. • Performs a technical analysis of tax returns, audit files, supporting documents and tax systems to determine the tax, penalty and interest due on an account after payments are deducted, or determines adjustments required to correct or resolve debt. • Performs an in-depth analysis of accounts being reviewed for specific enforcement actions. • Accesses cases in GenTax and documents all pertinent information. • Prepares and prints remittance processing documents, when appropriate, and directs the liability to the proper account period. • Reschedules or transfers cases, as necessary. • Lifts and carries tubs containing tax documents weighing up to 25 pounds. 					
20	<p>2. Confers in English or Spanish by telephone, correspondence and or in person with taxpayers, their representatives and/or others to make demand for payment of taxes or debt, or filing of missing returns:</p> <ul style="list-style-type: none"> • Provides technical assistance and guidance in preparing tax returns, and resolving inquiries and complaints dealing with highly technical tax issues, tax laws, rules and regulations. • Explains, in English or Spanish, issues, court decisions, tax laws and IDOR's position with respect to accounts in question. • Sets up and attends meetings with taxpayers located in-state and out-of-state. 					

20	3. Utilizes GenTax, or other computer systems, to access delinquent taxpayer cases: <ul style="list-style-type: none"> • Reviews and analyzes on-line information to determine the nature of the delinquencies and/or assessments, information regarding the taxpayer or business such as status, location and ownership, any documented financial, asset or secondary information, previous collection documentation or any transactions that have changed the status of the case. • Analyzes the on-line information to determine the collection action that needs to be taken, such as phone contact, correspondence, research or other collection action. • Takes the appropriate collection action, (i.e., collect in full, recommends adjustment or suspense). • Takes enforcement action as required, (i.e., liens, levies, revocations, referrals to outside agencies, offsets, non-renewal of licenses, license holds, etc.). • Records in the applicable system any action taken by using comments. • Obtains and documents financial, asset, secondary or other information regarding taxpayer cases. • Utilizes GenTax to reschedule cases. • Generates correspondence, by selecting the assessment and delinquency detail, and any variable information needed to construct the document. • On taxpayer initiated contacts, accesses the case in GenTax, analyzes the case as documented above. • Identifies the location of a collection case in GenTax and interprets the collection efforts being taken in order to assist the taxpayer. • Takes and recommends the appropriate collection action for tax compliance.
10	4. Recommends various courses of action to taxpayers, higher level staff, and managers in order to resolve collection cases: <ul style="list-style-type: none"> • Determines responsibility and issues penalties. • Transfers corporate debt to responsible officers. • Determines extension of time for tax payments and closing of cases determined to be un-collectible. • Recommends disposition of cases supported by documented information and evidence. • Compiles and prepares protest packages to support IDOR hearings.
10	5. Assists in preparation of training materials and mentors lower-level staff: <ul style="list-style-type: none"> • Assists in preparation of materials used in training new and lower-level employees. • Mentors new or lower-level employees in work processes. • Makes recommendations to revise operating procedures when applicable.
5	6. Participates in staff meetings: <ul style="list-style-type: none"> • Assists supervisor in the development of new and/or revised operating policies and procedures, staffing requirements, work schedules, etc., recommending changes in procedures to expedite workflow, etc., and implements changes upon approval by management.
5	7. Serves as a member of a project team, performing a segment of studies during the development and testing of new procedures and/or automated systems: <ul style="list-style-type: none"> • Assists in writing processing methods and procedures.
5	8. Compiles and prepares a variety of weekly, monthly and special management reports of work processed and pending.
5	9. Performs other duties as required or assignment which are reasonable within the scope of duties numerated above.
	10.

POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677871	PUBLIC SERVICE ADMINISTRATOR

CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires three years of experience as a Revenue Tax Specialist I with the Illinois Department of Revenue and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)Specialized Skills (Used for certain BU Employees only)**CONDITIONS OF EMPLOYMENT**

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

COMMENTS

12/17/25 - PUC#90678357 merged into this position - aml

1. POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST III-Spanish	Board of Appeals Support Specialist-Spanish Speaking (REVENUE TAX SPECIALIST III-Spanish Speaking)	Spanish	None	90678372	38573-25-01-110-11-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Board Of Appeals-01	Board of Appeals Support-110			2025-06-03
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Chicago - 555 West Monroe Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				
25	<p>1. Under general direction, as an advanced technical specialist, performs specialized research and analysis to help resolve highly complex, sensitive, or priority tax accounts involving various taxes administered by Illinois Department of Revenue (IDOR) and Board of Appeals (BOA) specific issues:</p> <ul style="list-style-type: none"> Analyzes BOA petitions, and related supporting documentation. Performs research in GenTax and other records maintained by IDOR for taxpayer and account attributes, payments, compliance history, and asset sources. Analyzes tax returns, claims and related schedules. Reviews IDOR, State and Federal legal rulings, IDOR rules and regulations, and IDOR policies and procedures in connection with a BOA case or position. Reviews collection cases, liens filed, and other enforcement actions (levy issuance, responsible officer assessment, transfer of asset assessment) and makes referrals to the proper IDOR units as needed. Refers accounts for audit review when appropriate. Reviews and requests adjustments to taxpayer accounts. Determines whether jurisdiction of a BOA case will be granted. Determines whether a Temporary Restraining Order (TRO) will be granted and the terms of the TRO. Drafts recommendations for BOA cases under a certain dollar threshold. 				
20	<p>2. Uses GenTax, MyTax and other IDOR computer systems and software to update BOA cases in BOA case manager:</p> <ul style="list-style-type: none"> Accesses and works within a wide range of GenTax managers, accounts and functions for a comprehensive understanding and processing of the BOA cases. Documents pertinent information in the Board case management system and with GenTax managers. Participates in or serves as a lead person in the design, testing and implementation of system updates and other revisions in the tax processing system as it relates to the BOA case manager. Serves as a backup support for the data entry of petitions filed with the BOA. 				

15	<p>3. Monitors compliance with TROs and BOA Orders:</p> <ul style="list-style-type: none"> • Reviews the terms of TROs and BOA Orders and sets up a systemic pay plan or other schedule to monitor compliance with payments and taxpayer’s on-going filing and payment obligations. • Monitors payments pursuant to TROs and pay plans established pursuant to final BOA Orders. • Issues additional information requests and ensures compliance by monitoring receipt of the required documentation. • Issues correspondence to the taxpayer or their representative including Pay Plan Approval Letters, Notices of Default and Dismissal Letters. • Recommends various courses of action such as revoking TROs and vacating BOA Orders for non-compliance. • Reviews license holds and recommends releases when appropriate. • Prepares remittance processing documents and directs payment to the proper account and period. • Reviews case history, follows procedures to apply payments correctly, and provides an accounting of the case when necessary.
15	<p>4. Corresponds with taxpayers and their representatives in English and/or Spanish by telephone, written correspondence, and in person:</p> <ul style="list-style-type: none"> • Provides information, assistance, guidance and instruction in English and/or Spanish concerning BOA procedures. • Provides guidance in resolving inquires or complaints dealing with complex or sensitive tax returns, issues, tax laws, rules and regulations. • Explains in English and/or Spanish specific tax issues, court decisions, tax laws and IDOR’s position with respect to an account or related case pending at the BOA. • Provides current information regarding accounts of taxpayers pending with the BOA. • Corresponds with taxpayers, or their representatives, regarding compliance issues or other questions related to a TRO, additional information request, a BOA Order or other item related to a BOA matter. • Monitors the BOA general mailbox which includes responding to taxpayers or their representatives and forwarding email correspondence to the appropriate person or program area. • Serves as a back-up to the main BOA phone line.
10	<p>5. Participates in staff meetings and prepares reports:</p> <ul style="list-style-type: none"> • Recommends and implements updates and changes to BOA procedures, correspondence, and the BOA case manager. • Compiles data and prepares various weekly, monthly or special reports. • Carries out special project assignments.
5	<p>6. Provides technical assistance to lower-level Revenue Tax Specialists and Revenue Tax Specialist Trainees performing similar but less complicated work:</p> <ul style="list-style-type: none"> • Provides guidance, assistance and on-the-job training to lower-level staff in applicable work methods and procedures. • Performs quality review of processed work of lower-level staff.
5	<p>7. Performs assistance for the Voluntary Disclosure Program and provides other duties as required or assigned which are reasonably within the scope of the duties under the Voluntary Disclosure Program.</p>
5	<p>8. Performs other duties as required or assigned, which are reasonably within the scope of the duties enumerated above.</p>
	9.
	10.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677718	Board of Appeals Support Manager (PUBLIC SERVICE ADMINISTRATOR OPT. 2)

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE “SAME AS SPECIFICATION” CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires three years of experience as a Revenue Tax Specialist II with the Illinois Department of Revenue and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)Specialized Skills (Used for certain BU Employees only)**20. CONDITIONS OF EMPLOYMENT**

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
3. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1. POSITION TITLE		WORKING TITLE (IF ANY)		BILINGUAL CODE	POSITION TITLE OPTION CODE		2. POSITION NUMBER		
EXISTING POSITION									
NEW/REVISED POSITION									
Revenue Tax Specialist III				29	SS		38573-25-82-110-51-02		
3. AGENCY			4. BUREAU/DIVISION		5. EXMT CODE	6. WORK COUNTY	7. A/I AUTH	8. AUDIT	9. OFFICE USE
EXISTING POSITION									
NEW/REVISED POSITION			Taxpayer Services/Taxpayer Assistance						
Revenue					0	016	2	R	
10. SECTION			11. UNIT		12. TRANSACTION CODE			13. EFFECTIVE DATE	
EXISTING POSITION					<input type="checkbox"/> MA021 ESTABLISH <input type="checkbox"/> MA022 EXEMPT CODE CHANGE <input type="checkbox"/> MC024 POSITION NUMBER CHANGE <input checked="" type="checkbox"/> MC026 CLARIFY <input type="checkbox"/> MC027 ADDITIONAL IDENTICAL CHANGE <input type="checkbox"/> MC028 WORK COUNTY CHANGE <input type="checkbox"/> MD021 ABOLISH <input type="checkbox"/> MC149 DOWNWARD REALLOCATION <input type="checkbox"/> MC150 LATERAL REALLOCATION <input type="checkbox"/> MC158 UPWARD REALLOCATION			09/01/2023	
NEW/REVISED POSITION									
Chicago Field Services									
14. WORK LOCATION			15. BARGAINING/TERM CODE		RUTAN EXEMPT				
EXISTING POSITION									
NEW/REVISED POSITION									
Cook County			RC062		N				
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS								
20%	<p>1. Under general direction, serves as an advanced technical specialist involving highly technical, analytical, procedural or legal application of tax laws administered by the Illinois Department of Revenue (IDOR) and provides outreach to the public and responses to highly technical, complex issues or legal questions to management staff, and/or the public:</p> <ul style="list-style-type: none"> • Performs in-depth and extensive research and analysis of the most complex or sensitive tax issues • Confers with taxpayers, their representatives and others by telephone, email and other correspondence, explaining tax regulations, requirements, policies and procedures • Interprets the application of laws administered by the IDOR, court decisions and opinions as they relate to specific issues and questions posed • Verifies adequate reporting methods, theory, complex mathematical, legal and procedural errors and determines type of research needed for resolution • Compiles documentation to support answers, adjustment actions, etc. • Develops outreach presentations on highly technical and complex issues relating to procedures or legal application of tax laws administered by the IDOR, attends and presents at outreach events • Travels in the performance of these duties. 								

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
20%	<p>2. Develops, reviews and revises operating procedures and manuals; develops and executes training programs relating to systems, technical tax issues, processing procedures, statutory changes and on the job training:</p> <ul style="list-style-type: none"> • Develops, reviews and revises operating and procedural manuals, determining which existing procedures need to be updated and/or revised • Writes new procedures for new functions, statutory changes, etc. • Develops, executes and instructs training classes relating to systematic logic, technical tax issues, refresher courses, statutory changes, processing procedures, system changes, etc. • Conducts studies of training needs • Develops training programs for lower level staff to provide skill necessary to perform increasingly complex work to include an in-depth knowledge of the GenTax system and the ability to teach it to others • Enters and checks batches for the GenTax system • Trains supervisory staff on technical changes • Develops means by which to determine if training was adequate or successful develops means by which to determine if training was adequate or successful • Provides on-the-job training to lower staff level tax specialists staff and trainees.
20%	<p>3. Interacts activities with other work areas for testing and projects as directed by higher level staff:</p> <ul style="list-style-type: none"> • Serves as lead analyst providing direction and assistance to same or lower level staff • Confers with staff to resolve cases of a unique or questionable nature or by providing interface with irate taxpayers • Apprises staff of and explains changes in policies and procedures • Serves as a technical consultant to both lower and upper level staff providing guidance and assistance in resolving complex processing and/or procedural problems • Provides responses to technical, highly complex, sensitive and legal questions to various areas on the IDOR and the public. • Participates in specific technical tax projects as directed by higher level staff • Translates functions/procedures into Spanish for individuals who cannot speak or read English, in contacts with the general public, advocacy groups, taxpayers and community organizations • Participates in special project and test teams or serves as lead member as requested • Compiles reports of new processing technologies and systemic changes, workflow problems, questionable analysis methods, etc. • Provides technical assistance to Division staff during the development of tax returns, schedules, instructions, etc. • Travel in the performance of these duties.
10%	<p>4. Maintains quality and production work measurement records; develops quality review procedures and processes:</p> <ul style="list-style-type: none"> • Develops quality review procedures and processes

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
	<ul style="list-style-type: none"> • Trains supervisors and lower level staff on theories and application of quality review • Maintains quality review records • Suggests changes in percentage of completed work reviewed based upon errors found, etc. • Resolves conflicts that arise when the definition of “error” is not readily apparent to processing and supervisory staff • Completes daily batching of GenTax.
10%	<p>5. Analyzes various forms and supporting documentation to determine compliance with statues and IDOR policy, to detect deficiencies and resolve discrepancies:</p> <ul style="list-style-type: none"> • Analyzes various tax forms of one or more tax types to include but not limited to, Sales Tax, Income Tax, Withholding Tax, Business Tax, Use & Service Tax, supporting documentation and any other documentation to determine compliance with statutes and policies, detect deficiencies, resolve discrepancies, etc., while verifying mathematical, technical and legal accuracy of returns processed and/or adjustments performed • Reviews, resolves and adjusts complex and/or sensitive situation accounts; corrects and/or initiates adjustments when errors are detected • Recommends to supervisory and lower level staff appropriate corrective action based on statutes, departmental policies, procedures, precedents and court decisions • Keeps management apprised of processing, statutory or procedural problems encountered • Recommends solutions to resolve complex tax questions or problems encountered to include but not to be limited to Sales Tax, Income Tax, Withholding Tax, Business Tax, Use & Service Occupation Tax addressing benefits and detriments resulting from proposed recommendations.
10%	<p>6. Monitors pending legislation, developing impact statements; interacts activities with other work areas; participates in or serves as a lead member on test teams:</p> <ul style="list-style-type: none"> • Provides technical and consultative services to Division staff, other governmental agencies, taxpayers, their representatives and others by interpreting established or amended statutes, departmental rules and regulations, etc., to resolve highly complex, sensitive or technical tax issues to verify compliance with statutes, rules, regulations, etc. • Monitors pending legislation, preparing impact statements and recommendations for changes to proposed legislation • Develops new legislative proposals for consideration by the General Assembly, citing benefits to the Department and/or taxpayers, processing areas, fiscal impact, administrative impact, etc. • Informs all employees of statutory changes • Assists with implementation of new legislation. • Coordinates work, technical issues, etc., with other areas of the Agency to resolve procedural conflicts, request information assistance, etc. • Monitors pending systemic change requests.

% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS
05%	<p>7. Confers with taxpayers, their representatives and others providing information in technical and lay terms depending on technical tax knowledge of the taxpayer:</p> <ul style="list-style-type: none"> • Responds to correspondence via email and other methods of communication • Communicates in Spanish to those individuals who do not read or speak English.
05%	<p>8. Performs other duties as required or assigned, which are reasonably within the scope of duties enumerated above.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

	WORKING TITLE (IF ANY)
Public Service Administrator 37015-25-82-110-50-01	Chicago Field Services Manager

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

- Supervisor Lead Worker

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

Position Title	Position Number	No. of Incumbents or Funded Vacancies

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires three years of experience as a Revenue Tax Specialist II with the Illinois Department of Revenue and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a fingerprint-based background check and tax.
2. Requires ability to travel in the performance of duties, with overnight stays as appropriate.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

20. CONDITIONS OF EMPLOYMENT


21. POSITION POSTING/MARKETING STATEMENT: Information in this statement is NOT intended to be all-encompassing or to address all responsibilities of the position.

The benefits of working at Department of Revenue include a 37 ½ hour work week, a generous salary and benefits package (paid time off for vacation, sick, or personal leave, twelve holidays) pension and other retirement benefits, tuition reimbursement, and insurance eligibility on day one (medical, dental, vision, and life).

22. ABOUT THE AGENCY/BUREAU/PROGRAM

The Illinois Department of Revenue (IDOR) administers Illinois tax laws and collects taxes in a fair, consistent, and efficient manner to provide accurate, timely, and reliable funding and information to state and local constituents. By using best practices, IDOR strives to continuously innovate and increase accuracy, efficiency, and productivity in all areas of operations and tax administration, thereby earning respect, delivering value, and being a trusted source of information.

IDOR is a professional-minded governmental entity that values its employees and invests in their success through training and engagement. IDOR values diversity, both culturally and professionally, and believes it can foster a more productive work environment best suited for serving the citizens and taxpayers of Illinois.

DIRECTOR OF CMS SIGNATURE	IMMEDIATE SUPERVISOR SIGNATURE	AGENCY HEAD SIGNATURE	DATE
<p><i>Raven DeVaughn by Mark Dawson</i> 10/19/2023</p>			<p>08/31/2023</p>

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST TRAINEE-UMP Certificate-Spanish	Taxpayer Account Processing Agent Trainee-Spanish Speaking (REVENUE TAX SPECIALIST TRAINEE-SPANISH SPEAKING) UMP	Spanish	UMP Certificate	90678434	38575-25-31-170-99-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Returns & Deposit Operations-31	Chicago Operations-170		Chicago RTS Pool-99	2025-04-23
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Chicago - 555 West Monroe Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

25	<p>1. Under immediate supervision, for a period of six (6) to twelve (12) months, in a controlled environment, receives a combination of classroom and on-the-job training relative to tax laws, rules, regulations, policies and procedures, research methods, communication skills and computer usage/concepts:</p> <ul style="list-style-type: none"> • Training involves the review, examination, completion and processing of original and amended tax returns, schedules, correspondence, registration applications, procedural aspects of applicable rules, regulations and policies, highly technical tax systems to determine filing requirements, filing history and multiple complex tax segment payment applications and other documents of increasing difficulty at a professional level relative to Illinois Department of Revenue (IDOR) activities and operations. • Receives training on use of multiple computer system applications, account resolution and adjustment processes, as well as basic letter writing and telephone skills.
25	<p>2. Receives and completes assignments of a routine and progressively more involved nature in specific phases of the tax examining processing in accordance with established rules, policies and procedures, including but not limited to the review and examination of all types of taxes to verify that all necessary data has been entered on returns and the validity of deductions taken:</p> <ul style="list-style-type: none"> • Ensures payments and/or attached remittances cover the tentative amount of tax owed in accordance with established regulations and protocols. • Reviews and examines original and amended returns, applications, schedules, correspondence, and other documents for correctness and accuracy. • Verifies computations are accurate by comparing computer printouts with returns/applications. • Makes routine corrections. • Initiates and completes adjustment action. • Computes tax, penalty and interest at the applicable statutory rates. • Validates mathematical accuracy of returns and supporting documentation through the performance of basic numerical calculations. • Codes tax returns for computer entry. • Operates a personal computer to input changes, corrections, deletions and/or additions to on-line or manual systems; inputs necessary information to initiate taxpayer correspondence. • Performs cashiering functions, e.g., assists taxpayers with walk-in payments and purchases, provides payment and sales receipts, etc. • Lifts and carries tubs of tax documents weighing up to 25 pounds. • Travels to other facilities for training purposes.
15	3. Receives classroom and extensive on-the-job training regarding telephone usage, skills and etiquette to promote effective and efficient communication with taxpayers and/or their representatives in English or Spanish.
15	4. Receives on-the-job training on computer usage and system applications in order for trainees to input corrective adjustment commands, initiate correspondence to taxpayers and perform various research functions to resolve taxpayer accounts and/or to answer taxpayer inquiries.
10	5. Receives basic technical training in specialized operations to enable the Trainee to assist group leaders and/or supervisors in priority situations.
5	6. Contacts, and/or initiates correspondence to taxpayers in English and Spanish and/or service agencies advising of errors and necessary corrective action, requesting clarification of tax reporting information, and providing information and assistance to Illinois and out-of-state taxpayers, their representatives and other IDOR personnel by telephone, personal contact and correspondence on all matters relating to the tax processes.
5	7. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.
	8.
	9.
	10.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677796	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill, and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write (Spanish) at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.
3. Qualifying state employees in the employee Upward Mobility Program, may complete combinations of specific proficiency tests and training programs leading to a certificate of proficiency in lieu of the stated requirements for this class.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a fingerprint-based background check and tax clearance.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires ability to travel in the performance of duties, with overnight stays as appropriate.
4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
5. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST TRAINEE-UMP Certificate-Spanish	Taxpayer Account Processing Agent Trainee-Spanish Speaking (REVENUE TAX SPECIALIST TRAINEE-SPANISH SPEAKING) UMP	Spanish	UMP Certificate	90678434	38575-25-31-170-99-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Returns & Deposit Operations-31	Chicago Operations-170		Chicago RTS Pool-99	2025-04-23
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Chicago - 555 West Monroe Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

25	<p>1. Under immediate supervision, for a period of six (6) to twelve (12) months, in a controlled environment, receives a combination of classroom and on-the-job training relative to tax laws, rules, regulations, policies and procedures, research methods, communication skills and computer usage/concepts:</p> <ul style="list-style-type: none"> • Training involves the review, examination, completion and processing of original and amended tax returns, schedules, correspondence, registration applications, procedural aspects of applicable rules, regulations and policies, highly technical tax systems to determine filing requirements, filing history and multiple complex tax segment payment applications and other documents of increasing difficulty at a professional level relative to Illinois Department of Revenue (IDOR) activities and operations. • Receives training on use of multiple computer system applications, account resolution and adjustment processes, as well as basic letter writing and telephone skills.
25	<p>2. Receives and completes assignments of a routine and progressively more involved nature in specific phases of the tax examining processing in accordance with established rules, policies and procedures, including but not limited to the review and examination of all types of taxes to verify that all necessary data has been entered on returns and the validity of deductions taken:</p> <ul style="list-style-type: none"> • Ensures payments and/or attached remittances cover the tentative amount of tax owed in accordance with established regulations and protocols. • Reviews and examines original and amended returns, applications, schedules, correspondence, and other documents for correctness and accuracy. • Verifies computations are accurate by comparing computer printouts with returns/applications. • Makes routine corrections. • Initiates and completes adjustment action. • Computes tax, penalty and interest at the applicable statutory rates. • Validates mathematical accuracy of returns and supporting documentation through the performance of basic numerical calculations. • Codes tax returns for computer entry. • Operates a personal computer to input changes, corrections, deletions and/or additions to on-line or manual systems; inputs necessary information to initiate taxpayer correspondence. • Performs cashiering functions, e.g., assists taxpayers with walk-in payments and purchases, provides payment and sales receipts, etc. • Lifts and carries tubs of tax documents weighing up to 25 pounds. • Travels to other facilities for training purposes.
15	<p>3. Receives classroom and extensive on-the-job training regarding telephone usage, skills and etiquette to promote effective and efficient communication with taxpayers and/or their representatives in English or Spanish.</p>
15	<p>4. Receives on-the-job training on computer usage and system applications in order for trainees to input corrective adjustment commands, initiate correspondence to taxpayers and perform various research functions to resolve taxpayer accounts and/or to answer taxpayer inquiries.</p>
10	<p>5. Receives basic technical training in specialized operations to enable the Trainee to assist group leaders and/or supervisors in priority situations.</p>
5	<p>6. Contacts, and/or initiates correspondence to taxpayers in English and Spanish and/or service agencies advising of errors and necessary corrective action, requesting clarification of tax reporting information, and providing information and assistance to Illinois and out-of-state taxpayers, their representatives and other IDOR personnel by telephone, personal contact and correspondence on all matters relating to the tax processes.</p>
5	<p>7. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>
	<p>8.</p>
	<p>9.</p>
	<p>10.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677796	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill, and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write (Spanish) at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.
3. Qualifying state employees in the employee Upward Mobility Program, may complete combinations of specific proficiency tests and training programs leading to a certificate of proficiency in lieu of the stated requirements for this class.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a fingerprint-based background check and tax clearance.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires ability to travel in the performance of duties, with overnight stays as appropriate.
4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
5. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST TRAINEE-UMP Certificate-Spanish	Taxpayer Account Processing Agent Trainee-Spanish Speaking (REVENUE TAX SPECIALIST TRAINEE-SPANISH SPEAKING) UMP	Spanish	UMP Certificate	90678434	38575-25-31-170-99-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Returns & Deposit Operations-31	Chicago Operations-170		Chicago RTS Pool-99	2025-04-23
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Chicago - 555 West Monroe Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

25	<p>1. Under immediate supervision, for a period of six (6) to twelve (12) months, in a controlled environment, receives a combination of classroom and on-the-job training relative to tax laws, rules, regulations, policies and procedures, research methods, communication skills and computer usage/concepts:</p> <ul style="list-style-type: none"> • Training involves the review, examination, completion and processing of original and amended tax returns, schedules, correspondence, registration applications, procedural aspects of applicable rules, regulations and policies, highly technical tax systems to determine filing requirements, filing history and multiple complex tax segment payment applications and other documents of increasing difficulty at a professional level relative to Illinois Department of Revenue (IDOR) activities and operations. • Receives training on use of multiple computer system applications, account resolution and adjustment processes, as well as basic letter writing and telephone skills.
25	<p>2. Receives and completes assignments of a routine and progressively more involved nature in specific phases of the tax examining processing in accordance with established rules, policies and procedures, including but not limited to the review and examination of all types of taxes to verify that all necessary data has been entered on returns and the validity of deductions taken:</p> <ul style="list-style-type: none"> • Ensures payments and/or attached remittances cover the tentative amount of tax owed in accordance with established regulations and protocols. • Reviews and examines original and amended returns, applications, schedules, correspondence, and other documents for correctness and accuracy. • Verifies computations are accurate by comparing computer printouts with returns/applications. • Makes routine corrections. • Initiates and completes adjustment action. • Computes tax, penalty and interest at the applicable statutory rates. • Validates mathematical accuracy of returns and supporting documentation through the performance of basic numerical calculations. • Codes tax returns for computer entry. • Operates a personal computer to input changes, corrections, deletions and/or additions to on-line or manual systems; inputs necessary information to initiate taxpayer correspondence. • Performs cashiering functions, e.g., assists taxpayers with walk-in payments and purchases, provides payment and sales receipts, etc. • Lifts and carries tubs of tax documents weighing up to 25 pounds. • Travels to other facilities for training purposes.
15	<p>3. Receives classroom and extensive on-the-job training regarding telephone usage, skills and etiquette to promote effective and efficient communication with taxpayers and/or their representatives in English or Spanish.</p>
15	<p>4. Receives on-the-job training on computer usage and system applications in order for trainees to input corrective adjustment commands, initiate correspondence to taxpayers and perform various research functions to resolve taxpayer accounts and/or to answer taxpayer inquiries.</p>
10	<p>5. Receives basic technical training in specialized operations to enable the Trainee to assist group leaders and/or supervisors in priority situations.</p>
5	<p>6. Contacts, and/or initiates correspondence to taxpayers in English and Spanish and/or service agencies advising of errors and necessary corrective action, requesting clarification of tax reporting information, and providing information and assistance to Illinois and out-of-state taxpayers, their representatives and other IDOR personnel by telephone, personal contact and correspondence on all matters relating to the tax processes.</p>
5	<p>7. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>
	<p>8.</p>
	<p>9.</p>
	<p>10.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677796	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill, and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write (Spanish) at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.
3. Qualifying state employees in the employee Upward Mobility Program, may complete combinations of specific proficiency tests and training programs leading to a certificate of proficiency in lieu of the stated requirements for this class.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a fingerprint-based background check and tax clearance.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires ability to travel in the performance of duties, with overnight stays as appropriate.
4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
5. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST TRAINEE-UMP Certificate-Spanish	General Tax Specialist Trainee-Spanish Speaking (REVENUE TAX SPECIALIST TRAINEE-Spanish Speaking) UMP	Spanish	UMP Certificate	90678436	38575-25-41-000-00-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	Yes	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Audit-41				2025-03-18
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Sangamon	Springfield - 101 W Jefferson St	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

25	<p>1. Under immediate supervision, for a period of six (6) to twelve (12) months, in a controlled environment, receives a combination of classroom and on-the-job training relative to tax laws, rules, regulations, policies and procedures, research methods, communication skills and computer usage/concepts:</p> <ul style="list-style-type: none"> • Receives training as to the proper review, examination, completion and processing of original and amended tax returns, schedules, correspondence, registration applications, procedural aspects of applicable rules, regulations and policies, highly technical tax systems to determine filing requirements, filing history and multiple complex tax segment payment applications and other documents of increasing difficulty at a professional level relative to Illinois Department of Revenue (IDOR) activities and operations. • Receives training on use of multiple computer system applications, account resolution and adjustment processes, as well as basic letter writing and telephone skills.
20	<p>2. Receives and completes assignments of a routine and progressively more involved nature in specific phases of the tax examining processing in accordance with established rules, policies and procedures including, but not limited to, the review and examination of all types of taxes to verify that all necessary data has been entered on returns and the validity of deductions taken:</p> <ul style="list-style-type: none"> • Reviews and verifies payments and/or attached remittances cover the tentative amount of tax owed. • Reviews and examines original and amended returns, applications, schedules, correspondence, and other documents for correctness and accuracy. • Verifies computations are accurate and compares computer printouts with returns/applications. • Initiates and completes adjustment action. • Computes tax, penalty and interest at the applicable statutory rates. • Reviews and verifies mathematical accuracy of returns and allied documents. • Codes tax returns for computer entry. • Operates a personal computer to input changes, corrections, deletions and/or additions to on-line manual systems. • Inputs necessary information to initiate taxpayer correspondence.
20	<p>3. Contacts and/or initiates correspondence to taxpayers and/or service agencies advising of errors and necessary corrective action, requesting clarification tax reporting information, and providing information and assistance to Illinois and out-of-state taxpayers, their representatives, other IDOR personnel by telephone, personal contact and correspondence on all matters related tax processes:</p> <ul style="list-style-type: none"> • Performs cashiering functions, e.g., assists taxpayers with walk-in payments and purchases, provides payment and sales receipts, etc. • Lifts and carries tubs of tax documents weighing up to 25 pounds.
15	<p>4. Receives classroom and extensive on-the-job training regarding telephone usage, skills and etiquette to promote effective and efficient communication with taxpayers and/or their representatives:</p> <ul style="list-style-type: none"> • Communicates in English and/or Spanish to taxpayers and/or their representatives.
15	<p>5. Receives basic technical training in specialized operations to enable the Trainee to assist group leaders and/or supervisors in priority situations:</p> <ul style="list-style-type: none"> • Assigned to all areas of the Audit Program Area to enhance experience in basic processing procedures, terminology, and techniques to become familiar with interrelationships among operating areas.
5	<p>6. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>
	7.
	8.
	9.
	10.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
SENIOR PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/Accounting/Budget/ Internal Audit/Insurance/ Financial	90678511	AUDIT PROGRAM ADMINISTRATOR (SENIOR PUBLIC SERVICE ADMINISTRATOR OPT 2)

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area with at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.
3. Qualifying state employees in the employee Upward Mobility Program, may complete combinations of specific proficiency tests and training programs leading to a certificate of proficiency in lieu of the stated requirements for this class.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. This position has been found to meet the requirements in section 4A-101 of the Illinois Governmental Ethics Act requiring the occupant/employee to file a Statement of Economic Interest. The Illinois Governmental Ethics Act (5 ILCS 420/4A et seq.) requires certain state officials and employees to file annual Statements of Economic Interest with the Office of the Secretary of State that will be made available for examination and copying by the public. All employees required to file a Statement of Economic Interest are also required to file the Supplemental Statement of Economic Interest with the Executive Ethics Commission. (See Executive Order 15-09) Fines and penalties apply to untimely filings.
5. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST TRAINEE-UMP Certificate-Spanish	Customer Service Specialist Trainee Spanish Speaking (REVENUE TAX SPECIALIST TRAINEE) UMP	Spanish	UMP Certificate	90678458	38575-25-82-110-31-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Customer Service-82	Taxpayer Assistance-110		Northern Field Services/Des Plaines-31	2024-09-27
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Des Plaines - 9511 W Harrison Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

30	<p>1. Under immediate supervision, for a period of six (6) to twelve (12) months, receives structured classroom and on-the-job training involving various facets of the Customer Services Bureau's programs and operations relative to the processing of all types of taxes:</p> <ul style="list-style-type: none"> • In a controlled environment, receives classroom and on-the-job training involving the review, examination, completion and processing of original and amended tax returns, schedules, correspondence, business registration applications, procedural aspects of applicable rules, regulations and policies, highly technical tax systems to determine filing requirements, filing history and multiple complex tax segment payment applications and other documents of increasing difficulty at a professional level relative to Customer Services Bureau's programs, activities and operations. • Receives training on use of multiple computer system applications, account resolution, and adjustment processes, as well as basic letter writing and interpersonal skills. • Receives classroom and extensive on-the-job training regarding telephone usage, skills and etiquette to promote effective and efficient communication with taxpayers and/or their representatives via telephone, personal contact and/or written communications. 	
30	<p>2. Receives and completes assignments of a routine and progressively more involved nature in specific phases of the tax examining process in accordance with established rules, policies, and procedures, including but not limited to the review and examination of all types of taxes to verify that all necessary data has been entered on returns and the validity of deductions taken:</p> <ul style="list-style-type: none"> • Reviews payments and/or attached remittances to ensure they cover the tentative amount of tax owed. • Collects payments via credit card or checks from taxpayers, enters payment into cashiering system and deposits through current vendor. • Reviews and examines original and amended returns, business registration applications, schedules, correspondence, and other documents for correctness and accuracy. • Reviews and verifies computations are accurate and compares computer printouts with returns/applications. • Makes routine corrections. • Initiates and completes adjustment action. • Computes tax, penalty and interest at the applicable statutory rates. • Reviews and verifies mathematical accuracy of returns and allied documents. • Codes tax returns for computer entry. • Operates a personal computer to input changes, corrections, deletions and/or additions to on-line or manual systems. • Inputs necessary information to initiate taxpayer correspondence. • Walks, stands, bends, reaches above shoulder level and lifts and carries tax documents weighing up to 25 pounds in the performance of duties. • Travels in the performance of duties. 	
20	<p>3. Confers with taxpayers in English and Spanish through written and verbal communications:</p> <ul style="list-style-type: none"> • Initiates correspondence to taxpayers in English and Spanish requesting clarification of tax reporting information. • Provides information and assistance to Illinois and out-of-state taxpayers, their representatives and other Illinois Department of Revenue (IDOR) personnel via telephone, personal contact and correspondence on matters relating to the tax processes and business registration applications. 	
10	<p>4. Receives a combination of classroom and on-the-job training relative to tax laws administered by IDOR, rules and regulations, tax forms, research methods and procedures, communication skills, system applications and computer usage/concepts:</p> <ul style="list-style-type: none"> • Receives classroom and on-the-job instructions and training relative to tax laws, rules, regulations, policies and procedures governing work assignments. • Performs various research functions in order to resolve taxpayer accounts and/or to answer taxpayer inquiries. 	
5	<p>5. Receives basic technical training in specialized operations to enable the trainee to assist in priority situations:</p> <ul style="list-style-type: none"> • Participates in project assignments. • Assists supervisor in more difficult work projects as part of the learning process. 	
5	<p>6. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>	
	<p>7.</p>	
	<p>8.</p>	
	<p>9.</p>	
	<p>10.</p>	
<p>17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)</p>		
<p>SUPERVISOR POSITION TITLE</p> <p>PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial</p>	<p>POSITION</p> <p>90677889</p>	<p>WORKING TITLE (IF ANY)</p> <p>PUBLIC SERVICE ADMINISTRATOR</p>
<p>18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:</p>		

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to travel in the performance of duties, with overnight stays as appropriate. Requires appropriate, valid driver's license.
3. Requires the ability to walk, stand, bend, and reach above shoulder level.
4. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
5. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
6. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST TRAINEE-UMP Certificate-Spanish	REVENUE TAX SPECIALIST TRAINEE (Customer Service Specialist Trainee Spanish Speaking) UMP	Spanish	UMP Certificate	90678463	38575-25-82-110-51-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Customer Service-82	Taxpayer Assistance-110		Chicago Field Office-50	2024-07-25
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Cook	Chicago - 555 West Monroe Street	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				

30	<p>1. Under immediate supervision, for a period of six (6) to twelve (12) months, receives structured classroom and on-the-job training involving various facets of the Customer Services Bureau's programs and operations relative to the processing of all types of taxes:</p> <p>1. In a controlled environment, receives classroom and on-the-job training involving the review, examination, completion and processing of original and amended tax returns, schedules, correspondence, business registration applications, procedural aspects of applicable rules, regulations and policies, highly technical tax systems to determine filing requirements, filing history and multiple complex tax segment payment applications and other documents of increasing difficulty at a professional level relative to Customer Services Bureau's programs, activities and operations.</p> <p>2. Receives training on use of multiple computer system applications, account resolution, and adjustment processes, as well as basic letter writing and interpersonal skills.</p> <p>3. Receives classroom and extensive on-the-job training regarding telephone usage, skills and etiquette to promote effective and efficient communication with taxpayers and/or their representatives via telephone, personal contact and/or written communications.</p>
30	<p>2. Receives and completes assignments of a routine and progressively more involved nature in specific phases of the tax examining process in accordance with established rules, policies, and procedures, including but not limited to the review and examination of all types of taxes to verify that all necessary data has been entered on returns and the validity of deductions taken:</p> <p>1. Reviews payments and/or attached remittances to ensure they cover the tentative amount of tax owed.</p> <p>2. Collects payments via credit card or checks from taxpayers, enters payment into cashiering system and deposits through current vendor.</p> <p>3. Reviews and examines original and amended returns, business registration applications, schedules, correspondence, and other documents for correctness and accuracy.</p> <p>4. Reviews computations, verifies their accuracy, and compares computer printouts with returns/applications.</p> <p>5. Makes routine corrections.</p> <p>6. Initiates and completes adjustment action.</p> <p>7. Computes tax, penalty and interest at the applicable statutory rates.</p> <p>8. Reviews and verifies mathematical accuracy of returns and allied documents.</p> <p>9. Codes tax returns for computer entry.</p> <p>10. Operates a personal computer to input changes, corrections, deletions and/or additions to on-line or manual systems.</p> <p>11. Inputs necessary information to initiate taxpayer correspondence.</p> <p>12. Walks, stands, bends, reaches above shoulder level and lifts and carries tax documents weighing up to 25 pounds in the performance of duties.</p> <p>13. Travels in the performance of duties.</p>
20	<p>3. Confers with taxpayers in English and Spanish through written and verbal communications:</p> <p>1. Initiates correspondence to taxpayers in English and Spanish requesting clarification of tax reporting information.</p> <p>2. Provides information and assistance to Illinois and out-of-state taxpayers, their representatives and other Illinois Department of Revenue (IDOR) personnel via telephone, personal contact and correspondence on matters relating to the tax processes and business registration applications.</p>
10	<p>4. Receives a combination of classroom and on-the-job training relative to tax laws administered by IDOR, rules and regulations, tax forms, research methods and procedures, communication skills, system applications and computer usage/concepts:</p> <p>1. Receives classroom and on-the-job instructions and training relative to tax laws, rules, regulations, policies and procedures governing work assignments.</p> <p>2. Performs various research functions in order to resolve taxpayer accounts and/or to answer taxpayer inquiries.</p>
5	<p>5. Receives basic technical training in specialized operations to enable the trainee to assist in priority situations:</p> <p>1. Participates in project assignments.</p> <p>2. Assists supervisor in more difficult work projects as part of the learning process.</p>
5	<p>6. Performs other duties as required or assigned which are reasonably within the scope of duties enumerated above.</p>
	<p>7.</p>
	<p>8.</p>
	<p>9.</p>
	<p>10.</p>

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
PUBLIC SERVICE ADMINISTRATOR-Fiscal Management/ Accounting/Budget/ Internal Audit/Insurance/Financial	90677891	PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires knowledge, skill, and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires the ability to speak and write Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.
3. Qualifying state employees in the employee Upward Mobility Program, may complete combinations of specific proficiency tests and training programs leading to a certificate of proficiency in lieu of the stated requirements for this class.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. Requires ability to travel in the performance of duties, with overnight stays as appropriate. Requires appropriate, valid driver's license.
3. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
4. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, table, etc.
5. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.

1.POSITION TITLE	WORKING TITLE	BILINGUAL CODE	SKILL CODE	2. POSITION NUMBER	LEGACY POSITION NUMBER
REVENUE TAX SPECIALIST II-Spanish	Taxpayer Account Processing Agent II-Spanish Speaking (REVENUE TAX SPECIALIST II-SPANISH SPEAKING)	Spanish	None	90678335	38572-25-33-100-99-02
REVOLVING DOOR	STMT. OF ECONOMIC INTEREST	5. EXMT CODE	SITE	POSITION TYPE	7. MI
false	No	Not Exempt	In-Office	SP	true
AGENCY	DIVISION	10. SECTION		11. UNIT	13. EFFECTIVE DATE
Department of Revenue	Central Processing-33				2025-04-22
6. WORK COUNTY	14. WORK LOCATION	15. BARGAINING/TERM CODE		JOB PROTECTED	
Sangamon	Springfield - 101 W Jefferson St	USA/RC062		Yes	
% OF TIME	16. COMPLETE CURRENT AND ACCURATE STATEMENT OF POSITION ESSENTIAL FUNCTIONS				
25	<p>1. Under general direction, reviews, analyses and evaluates routine, non-routine, and highly technical original tax returns, amended returns, audit returns, schedules, refund claims, claims for credit, requests for "reasonable cause" accommodation, requests to "protest", registration applications, license/certificate renewals, and other tax-related transactions for all tax types administered by the Central Processing Bureau (CPB):</p> <ul style="list-style-type: none"> Utilizes the research resources that are available (i.e., Internet, intranet, legal ruling letters, on-line inquiry data, statutes, regulations, policy directives, paper document records, digital records, etc.), to determine the appropriate corrective action to be taken. Examines and responds to taxpayer notices, incoming correspondence (i.e., telephone calls, mail, faxes, e-mails, etc.), account records, flagged and suspended transactions, issues with priority accounts, legislative referrals, disputed billings, and other increasingly complex documents or electronic transactions to ensure the completed work or account adjustments comply with tax laws, rules, and regulations as well as mathematical, technical, and procedural accuracy. Detects fraudulent or suspicious paper- and electronically- filed returns and notifies the appropriate staff. Makes factual and technical determinations, initiates manual or computer system corrective, adjustment, or billing/refund actions, to resolve discrepancies, deficiencies or processing errors and ensures the processing system has accepted the transactions. Meets the established performance measure standards within the work area assigned. Assigned throughout CPB, as needed, to processing duties associated with the numerous taxes administered by the bureau. 				
10	<p>2. Computes tax, penalty, and interest due or payable:</p> <ul style="list-style-type: none"> Explains these computations to Spanish- and English-speaking taxpayers, or their representatives, when working a specific taxpayer's account, or explains the method for computing these amounts in response to general inquiries. Utilizes supporting documentation, such as federal and out-of-state documents, to aid in computations. Performs routine and complex mathematical calculations. Disallows return discounts, deductions, or modifications, when appropriate. Adjusts tax accounts to reflect Board of Appeals or Administrative Hearings case dispositions. Cancels all or portions of assessments, bills, claims, refunds, etc. Calculates the proper allocation of revenues to local municipalities in accordance with statutes. 				
10	<p>3. Approves or denies reasonable cause requests based on procedural and statutory guidelines:</p> <ul style="list-style-type: none"> Follows established guidelines and procedures to approve or deny abatement of penalties and/or interest. Requests additional information from taxpayers, or their representatives, in order to have sufficient information to approve or deny reasonable cause. Informs taxpayers, or their representatives, of the decision. 				

10	4. Utilizes all resources available to determine the appropriate corrective actions necessary to adjust taxpayers accounts: <ul style="list-style-type: none"> • Reconstructs taxpayer history. • Determines validity and accuracy of returns and claims through research (e.g., reviewing statutes, rules, etc.). • Updates numerous office-support or tax-support database files, as assigned. • Lifts and carries tax documents weighing up to 25 pounds.
10	5. Corresponds with both Spanish- and English-speaking taxpayers, or their representatives, via written and oral communication regarding Illinois and out-of-state individual, corporate, fiduciary, excise, and sales tax, in order to facilitate account processing: <ul style="list-style-type: none"> • Seeks additional documentation, or forms needed, to resolve discrepancies or disputed account balances. • Assists taxpayers, their representatives, and others regarding laws administered by Illinois Department of Revenue (IDOR). • Gives advice regarding appropriate action necessary for compliance. • Provides assistance and guidance to taxpayers in the completion of all types of amended returns, including all supporting documentation necessary, to resolve discrepancies, deficiencies, or other errors.
10	6. Serves as a member on special projects or test teams assigned to perform specific tasks during the design, development, testing and implementation of new processes or automated systems: <ul style="list-style-type: none"> • Assists in the identification and resolution of problems associated with designing, implementing and integrating electronic registration, electronic filing and electronic payment programs. • Responds to technical inquiries from electronic commerce program participants and vendors. • Provides input during the design of new or revised tax forms and supporting documents. • Writes and updates processing procedures.
10	7. Assists in preparation of training materials and mentors lower-level staff: <ul style="list-style-type: none"> • Assists in preparation of materials used in training new and lower-level employees. • Mentors new or lower-level employees in work processes.
5	8. Serves to support continuous improvement efforts across CPB: <ul style="list-style-type: none"> • Recommends improved methods of operation to supervisors.
5	9. Maintains a variety of production statistics, inventory records, and various reports both on a regular basis and upon request from Management.
5	10. Performs other duties as required or assigned, which are reasonably within the scope of the duties enumerated above.

17. POSITION TITLE AND NUMBER IMMEDIATE SUPERVISOR (Responsible for assigning and reviewing work, preparing, conducting and signing performance evaluations; effectively recommending and imposing disciplinary action and adjusting grievances for the incumbent of this position.)

SUPERVISOR POSITION TITLE	POSITION	WORKING TITLE (IF ANY)
SENIOR PUBLIC SERVICE ADMINISTRATOR-General Administration/Business Marketing/Labor/Personnel	90678507	SENIOR PUBLIC SERVICE ADMINISTRATOR

18. CHECK THE APPROPRIATE BOX IF THIS POSITION IS A:

NOTE: Supervisory or lead worker responsibilities must be described in a detailed duty statement(s) with a time percentage(s) allotted. If a box was checked above, list position title, position number, and number of subordinate incumbents or authorized funded headcount.

POSITION TITLE	POSITION NUMBER	NO. OF INCUMBENTS OR FUNDED VACANCIES

19. SPECIALIZED KNOWLEDGES, SKILLS, ABILITIES, LICENSURE OR CERTIFICATION NECESSARY FOR THE SUCCESSFUL PERFORMANCE OF THE WORK OF THIS POSITION. NOTE: SINCE THERE ARE NOW SEVERAL OPTIONS OF SKILLS AND ABILITIES AND LICENSURE OR CERTIFICATION IDENTIFIED ON STANDARDS, THE PHRASE "SAME AS SPECIFICATION" CAN NO LONGER BE USED.

Minimum Qualifications

1. Requires three years of experience as a Revenue Tax Specialist I with the Illinois Department of Revenue and either: knowledge, skill and mental development equivalent to the completion of four years of college; OR four years of work experience providing tax related support functions within a program area at the Illinois Department of Revenue.
2. Requires ability to speak and write in Spanish at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

Preferred Qualifications (In Order of Significance)

Specialized Skills (Used for certain BU Employees only)

20. CONDITIONS OF EMPLOYMENT

1. Requires the ability to successfully complete a tax compliance and fingerprint-based background check.
2. This position is considered medium work as defined by the U.S. Department of Labor (20 CFR 404.1567(c)). Medium work involves lifting no more than 50 pounds at a time with frequent lifting or carrying of objects weighing up to 25 pounds.
3. Requires the ability to use and secure a state issued mobile device, e.g., cellular phone, laptop computer, tablet, etc.
4. The conditions of employment listed here are incorporated and related to any of the job duties as listed in the job description.