

ADMINISTRATIVE RESEARCH TECHNICIAN

Role Summary

The Administrative Research Technician consists of three grade levels (grade 8-10). Incumbents answer phone inquiries, route telephone calls, receive visitors, research inquiries necessary to provide information, maintain and track database systems, and are responsible for office maintenance functions, i.e., equipment and office supplies. Work includes typing letters, forms, and memos, proofreading and editing documents. Grade 10 incumbents also perform audit research duties and telephone surveys for valuation, accuracy, and compliance as well as other related functions as required, explaining research results, coordinating computer cross-matches, and assisting auditors with research. Primary contacts are with the Management Officer, division administrator, bureau chiefs, unit managers, specialists, other division and department staff, and internal/external customers.

Working Conditions

Periods of mental stress; working under pressure of workload, time constraints, and deadlines. Ability to work in an office setting with noise distractions. Extensive computer and keyboard use.

Education and Experience

- Grade 08: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to graduation from high school and one year of general office experience including word processing. Other combinations of education and experience will be evaluated on an individual basis.
- Grade 09: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to graduation from high school and two years of office/clerical experience including use of word processing spreadsheet, database, and software applications/programs. Other combinations of education and experience will be evaluated on an individual basis.
- Grade 10: competencies and degree of proficiency are typically acquired through a combination of education and experience equivalent to high school graduation and two years of work experience in bookkeeping and accounting with an emphasis in either individual income tax or investigative research (depending on work area), one year of which may be substituted by the completion of college level accounting course work. Other combinations of education and experience will be evaluated on an individual basis.

Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.

- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.
- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.
- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

Grade 8

Predominant / Essential Duties

- Serve as a contact for taxpayer inquiries. Assist internal and external customers with division-related questions and follow up to ensure timely closure.
- Answer telephone and route calls.
- Open, sort, and distribute mail to the appropriate parties.
- Responsible for the proper filing of various documents.
- Research routine inquiries as necessary to provide information. Direct inquires/issues outside his/her level of responsibility or expertise to appropriate personnel.
- Assist with comprehensive tax mailings.
- Assist wage-based team in typing acknowledgement letters, update system with notes on assigned projects. Research address changes and make appropriate changes in database.
- Sort and match Statements of Account with letters for auditors.
- Process 1099 comment cards and input information from forms.
- Make travel arrangements.
- Maintain, track, and research information using a variety of database systems.
- Responsible for office maintenance functions, i.e., equipment and office supplies.
- Point of contact for technical and office equipment problems.
- Type letters, forms, and memos. Compose correspondence. Proofread, edit, and finalize documents using established process guidelines.
- Responsible for legislative support.

Grade 9

Predominant/Essential Duties

- Compile and extract information from existing databases in order to produce reports.
- Assist auditors with reports by identifying problems and printing reports.
- Assist auditors in keeping track of records physically located at other sites.
- Research inquiries as necessary to provide information or responses.
- Research requests and process daily W2 information from warehouse for field auditors.
- Provide consistent information on existing policies, procedures, rules, and statutes.
- Primary contact for beer and wine wholesalers. Coordinate with taxpayers to insure that fines are collected in a timely manner.
- Complete beer and wine reports and maintain monthly balance and coordinate with budget analyst for completion of billing.
- Proofread and edit documents using established process guidelines.
- Design, format, and type various documents in draft and final form, such as complex agreements, contracts, legislation, administrative rules, and less complex documents such as letters, memos, and manuals. Use various advanced word processing functions such as tables, columns, graphics, line draw, etc., to accomplish these tasks.
- Determine methods and procedures to properly design, prepare, and produce spreadsheets.
- Coordinate meeting activities for internal and external customers.
- Responsible for special projects as assigned.
- Transcribe and process correspondence, meeting minutes, etc.
- Act as a liaison between the staff and related Divisions in assigned area.
- Primary contact with the state motor pool regarding leased vehicles.
- Arrange with the Department of Administration for the cancellation and reissue of gas cards, obtaining replacement plates, and coordinate with the Department of Justice for skip plates.
- Coordinate the surplus of vehicles with property and supply.
- Advise Management Officer on recommendations for improving and streamlining office procedures.

Grade 10

Predominant/Essential Duties

- Perform office research and quality assurance surveys for assigned tax types.
- Utilize federal information to conduct research (such as RARs and CP 2000s).
- Notify and explain research results to customers/auditors.
- Coordinate with other state governmental agencies for computer cross-matches.
- Answer specific tax type questions.
- Assist auditors with research for assigned tax types.
- Review and complete requests for waiver and/or abatement of tax, penalty, and interest within established procedures.
- Verify and release refunds within established procedures.
- Adjust tax liability on computer generated error reports/review items and reconciliation of accounts.

Competencies and Degrees of Proficiency

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

Competency/Proficiency Chart – Administrative Research Technician Role

Competencies	Grade 8 Under Guidance	Grade 9 Minimal Guidance	Grade 10 Minimal Guidance
Demonstrated skill and ability to maintain office equipment and resources.	A	B	C
Demonstrated skill and ability to work on multiple tasks.	A	B	B
Demonstrated knowledge and skill of word processing, spreadsheet, database, and software applications/programs relative to the role.	A	B	C
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	B	B	C
Demonstrated knowledge and ability in conflict resolution techniques relative to the role.	A	A	B
Demonstrated knowledge of assigned tax types and their relationships within the organization.	N/A	A	B
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to role.	N/A	A	B
Demonstrated analytical skills relative to the role.	N/A	A	B
Demonstrated research skill relative to the role.	A	B	C
Demonstrated knowledge of department business processes and ability to apply that knowledge effectively.	N/A	A	B
Demonstrated skill, ability and knowledge of legal guidelines, rules, practices, and procedures.	N/A	A	B
Demonstrated ability to think creatively and recommend innovative solutions.	N/A	A	B
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, actions, and results. Follow issues through to completion.	B	B	C

Degree of Proficiency

A: A degree of knowledge, skill, or ability commensurate with elementary-level tasks and assignments.

B: A degree of knowledge, skill, or ability commensurate with intermediate-level tasks and assignments.

C: A degree of knowledge, skill, or ability commensurate with advanced-level tasks and assignments.

D: An advanced degree of knowledge, skill, or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

E: The most advanced degree of knowledge, skill, or ability, evidencing complete mastery and understanding of the subject.