

Job and Person Specification

Title of Role: Taxation Officer

Remuneration Level: ASO3 Proposed

Business Unit: Public Trustee

Type of Appointment: Ongoing

Division: Taxation Services

Position Number: M09157, M09146

Job and Person Specification Approval

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Primary Purpose

The Taxation Officer will be responsible for completing a caseload of tax returns, including personal estates customers, deceased estates, trusts and date of death tax returns.

Reporting Relationships

- Role reports to Manager, Taxation Services

Key Relationships/Interactions

- Personal Estates and Estate Services staff
- Colleagues in Taxation Services
- Australian Taxation Office
- External tax agents

Key Challenges

- Contribute to the provision of an efficient and high quality tax return preparation service by completing a caseload of taxation matters, in an efficient and timely manner. Taxation Officers will proactively support the Manager, Taxation Services in providing excellent service to customers and stakeholders.
- Maintaining an acceptable level of up to date knowledge on taxation legislation and practice.
- Ensuring all returns are completed with high levels of accuracy and according to expected quality standards.
- Providing timely proactive customer service both to internal staff and customers.

Special Employment Conditions

- Some out of hours work and occasional intrastate and/or interstate travel may be required.
- May be required to undertake alternative duties within Public Trustee at the same classification level to meet operational needs.



- Employees will provide the highest standards of customer service to customers at all levels by modelling service excellence that meets the needs of customers and enhances the corporate profile of the organisation.
- Employees are expected to maintain the integrity and security of all information for which they are responsible as a result of employment in the Attorney-General's Department.

AGD Conditions

- Participation in quarterly performance review and development;
- Actively participate in all mandatory training requirements;
- Abide by the standards in the Code of Ethics for the South Australian Public Sector (the Code), relevant legislation and AGD policies and procedures; and
- Employment is dependent upon a National Police Certificate clearance that the AGD finds satisfactory.

Flexible Working Arrangement Options

- Flexible time arrangements are available in this role.



Responsibilities

This Job and Person Specification provides an indication of the type of duties you will be engaged to perform. You may be lawfully directed to perform any duties that a person with your qualifications, skills and abilities would reasonably be expected to perform. The Taxation Officer is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Taxation Return Service Delivery	• The completion of an agreed caseload of tax returns, PAYG instalments and requests for amendments in a timely and efficient manner. • Ensure tax returns are prepared accurately in accordance with income tax legislation and lodged in an efficient and timely manner. • Liaise with internal and external stakeholders, including the ATO, as required. • Responsible for a range of administrative tasks including but not limited to those associated with the monitoring, investigation, preparation and lodgement of tax returns.	• Completed agreed case load of tax returns within agreed timeframes. • Outstanding matters followed up /concluded in a timely manner. • Meets all quality and lodgement targets. • Responds to enquiries within agreed timeframes. • Meet personal revenue and caseload targets.
Quality Assurance and Branch Professional Development	• Ensuring all work is completed with high levels of accuracy and quality, optimising tax outcomes for customers. • Develop and maintain sound levels of competency with systems, ensuring all data is accurate and complete. • Complying with the application of effective risk and compliance management controls.	• Tax Returns comply with required quality and accuracy standards and optimise outcomes for customers. • Competency with key tax software • tax knowledge is maintained and improved.
Systems Management and Business Improvement	• Supports the application of business process and systems improvement initiatives.	• Supports process improvements, resulting in efficiency gains across the branch.
Business Engagement across Public Trustee	• Provide timely and accurate responses to requests for information and assistance from staff in other branches.	• Internal Stakeholder satisfaction is maintained at high levels.
Contribute to Culture	• Actively participates in and contributes to responsible and safe work practices. • Embraces diversity and cultural differences in the workplace.	• Work practices are safe and WHS legislation, policies and procedures are adhered. • Respectful behaviour observed when faced with diversity/differences in opinion.



Technical Expertise

Qualifications, Skills, Knowledge and Experience relevant to the role

Technical Expertise and Experience (Essential)	• Sound knowledge and experience in the preparation of tax returns. • Working knowledge and understanding of taxation law and regulations. • Sound ability to communicate effectively, both verbally and in writing • Proven ability to determine priorities, cope with high volumes of work, plan and organise workloads, set targets, meet deadlines with high level of accuracy. • Ability to represent customers on matters with the ATO • Demonstrated integrity and confidentiality when dealing with matters of a sensitive nature. • Demonstrated ability to work in a team environment and participate as an effective team member. • Ability to represent customers on matters with the ATO. • Experience using tax preparation and lodgement software and office automation products, particularly MS Excel. • Exercise initiative in the application of established practices or procedures. • Flexibility, adaptability and versatility of approach to handle changing work requirements • Knowledge of the principles and practice of WHS, Equal Opportunity, the PS Act 2009.
Technical Expertise and Experience (Desirable)	• Preparation of deceased estate, and trust tax returns. • Knowledge of deceased estate administration, trusts and superannuation tax matters. • Knowledge of Public Trustee products and services. • Appropriate post-secondary qualifications

Behavioural Capabilities

The AGD Performance Matrix describes the behaviours expected of AGD employees across various levels in the Department.

Descriptors below detail the behavioural capabilities required for performance in the Taxation Officer. Key behaviours for this role are listed with the critical behaviours highlighted in **bold**. This broader group of behaviours are applicable to your ongoing success in the role.

	Strategic Focus	Results Orientation	Service Delivery Excellence	Relationship Management	Professional Approach and Drive
Strategic	Shapes Strategic Thinking and Change	Achieves Organisational Results	Drives Business Excellence	Forges Relationships and Engages Others	Exemplifies Personal Drive and Professionalism
Tactical	Promotes Strategic Thinking and Change	Achieves Team Results	Delivers Business Excellence	Establish Relationships and Engages Others	Models Personal Drive and Professionalism
Operational	Supports Strategic Direction	Achieves and Monitors Own Results	Supports Service Delivery Excellence	Fosters Working Relationships	Supports Personal Drive and Professionalism
Foundational	Understands the Strategic Direction	Achieves Individual Results	Contributes to Service Delivery Excellence	Maintains Working Relationships	Demonstrates Personal Drive and Professionalism



Element	Behaviours
Understands the Strategic Direction	• Knows how own work contributes to goals and plans • Identifies risks within own work practices • Is flexible to changing priorities • Is open to change and new approaches
Achieves and Monitors Own Results	• Critically evaluates issues and ensures solutions are practical and achievable • Takes responsibility for the delivery of quality and timely results • Prioritises workload effectively and negotiates deadlines where appropriate • Measures performance and acts on opportunities for continuous improvement
Contributes to Service Delivery Excellence	• Shares awareness of potential problems and opportunities • Delivers high quality internal and external customer service • Effectively manages their own performance positively contributing to team performance • Seeks guidance/advice from others where necessary
Fosters Working Relationships	• • Consults and seeks the views of relevant stakeholders • Develops effective working relationships and internal networks • Shares information and knowledge as appropriate • Actively Listens and communicates clearly.
Demonstrates Personal Drive and Professionalism	• Contributes to a culture of respect and high ethical standards • Appropriately expresses own views and is respectful of the views of others • Remains positive and recovers quickly from setbacks • Pro-actively seeks to develop skills and knowledge

Acknowledged by
occupant

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(Print name)

(Signature)

Acknowledged by line
manager

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(Print name)

(Signature & title)

