

Income Tax Assistant (LTA)

Treasury/Income Tax

What will you do?

As an Income Tax Assistant within the Core Assessing Admin Team you will be providing vital administrative support to the wider Core Assessing Group which consist of the Non-Corporate and Corporate Teams as well as the Pensions, Trusts and Estates team.

You will be assisting with the data inputting and processing of individual and corporate tax returns, maintaining accurate records and delivering a high standard of customer service across a variety of client types by responding to basic enquiries via telephone, email and the public counter. You will form part of a multifunctional team handling documents, liaising with internal and external clients where attention to detail, discretion and a commitment to upholding confidentiality are essential.

How does this work?

Your journey will begin within the Core Assessing Admin Team, where this role will provide you with a strong foundation for your career, equipping you with essential skills and knowledge in Income Tax and National Insurance, whilst contributing meaningfully to the wider objectives of the Division.

You will be fully supported and nurtured as you develop your understanding of our systems and processes, enabling you to provide excellent customer service and uphold the standards expected across the Division. As your experience grows you will have the opportunity to progress into the Assessing Team where you will have the chance to take on more technical responsibilities and casework.

You will then have the opportunity to continue your journey within the Assessing Group, where your development will enable you to provide our clients with an excellent level of customer service. You will continue to develop and learn more detailed technical understandings of Income Tax casework helping to build confidence, capability and a good understanding of Income Tax.

What does this involve?

These day to day functions include:

- Data inputting paper return forms for various client types, with a view to triaging and/or processing assessments where applicable and within scope
- Logging and referring incoming physical mail to the correct team/officer using the tax system
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- Processing, issuing and responding to relevant correspondence

- Support the administration of the Income Tax General Enquiries Inbox and respond to general incoming queries, and where required ensuring timely and accurate redirection to relevant officers or teams.
- Assist and maintain up to date accurate address information and perform corrections against mismatched address data to support reliable record keeping
- Process the data required for Income Verifications for external authorities
- Prepare, provide and respond to Assessing Admin notifications, taking appropriate action or redirecting to relevant teams as required
- Prepare and issue documentation for taxpayers, including residency confirmation, employment and address history letters, and provide when requested by taxpayers copies of their tax related correspondence such as Assessment Notices etc.
- Process Bulk Pension Letters, particularly in relation to treaty suspension reviews
- Process Payment on Account Holdover Request Slips, ensuring documentation is logged appropriately
- Request missing return documentation required to progress the processing of return forms
- Any other tasks allocated by the Core Assessing Admin Operational Manager

This post works as part of a small integrated team and there is a requirement to move flexibly across the various duties in response to peaks in workload.

Performance Management and Improvement

All civil servants have a personal responsibility for performance management. The post holder's performance and development will be assessed through a continuous review procedure based on the PSC People Quality requirements for Credibility, Character and Capability (3C's level 1)

Reporting framework

The post holder reports to the Support Services Manager (EO). As Reporting Officer, the Support Services Manager will ensure that in line with the requirements and timescales set out in the scheme, amongst other things, an annual:

- Performance and Development Review and Personal Development Plan is agreed
- Review and assessment of performance and competencies/behaviours is made
- Minimum 6 Performance and Development review meetings are conducted

Integrity

As an appointee of the Income Tax Division, Treasury, the post holder is expected to recognise that their everyday business requires the highest level of personal integrity. Each officer has a personal responsibility to maintain the confidentiality of all Income Tax Division and Treasury business and to uphold such confidences.

General Scope

This document is intended to be a guide to the general scope of duties and is not a rigid, inflexible specification. The employee shares with the employer the responsibility for suggesting alterations to the scope of duties to improve the work situation. This job

description will be reviewed as necessary to reflect the future requirements of the Income Tax Division and the Treasury.

Health and Safety

The post holder will be responsible for their own health and safety and the impact of their actions on others. They will be responsible for identifying any possible risk or near misses to a responsible manager and/or the person responsible for Health and Safety in the Income Tax Division.

Confidentiality

You are required to comply with the Official Secrets Act 1911 and 1920. Breach of this confidence will result in action under the Disciplinary Procedure and may lead to dismissal. In the case of income tax, national insurance, personal or sensitive data held you may be personally liable at law if you in any way contravene the appropriate terms of the Data Protection Act 2018, the Income Tax Act 1970 and/or the Social Security Administration Act 1992.

Policies, Procedures and Regulations

You are required to comply with all policies, procedures and regulations issued by the Isle of Man Government, Public Service Commission. These can be obtained through your Line Manager.

What do you need to be successful in this role?

	Essential or Desirable	Method of Assessment
Credibility		
No formal qualifications are required for this post		
Previous experience in an office environment	D	CV
Have open conversations and address issues	E	Interview
Build supportive relationships	E	Interview
Numerate and able to demonstrate accuracy and attention to detail	E	Interview
Experience working with a team, working on own initiative and following instructions	D	CV/Interview
Capability		
Basic computer skills – a knowledge of Microsoft applications	E	CV/Interview
Operational knowledge of office equipment – copiers/scanners/printers	D	CV/Interview
Able to work under pressure and to deadlines during busy periods	E	CV/Interview
Excellent organisational skills – able to deal with a variety of duties	E	CV/Interview
Makes considered decisions	E	Interview
Be future focused	E	Interview
Character		
Able to work independently without supervision on occasions	E	Interview
An accurate and reliable worker	E	Interview
Enthusiastic and self-motivated	E	Interview
A flexible approach – able to deal with changing priorities	E	Interview
A confident, friendly and helpful manner with a strong focus on customer service	E	Interview
Trusts and is trusted	E	Interview
Inspires and motivates	E	Interview
Other requirements		
Isle of Man Worker	D	Application