

# Assessing Officer (Income Tax Officer)

## Treasury/Income Tax

### What will you do?

As an Income Tax Officer, you will deliver customer service excellence by responding to enquiries via telephone, email and at times the public counter. Your role involves ensuring clients are accurately assessed on their income, with the appropriate deductions and allowances applied. You will determine whether clients are liable to pay the correct amount of Income Tax and National Insurance or entitled to a refund where overpayments have occurred, thereby supporting fair and efficient tax administration.

### How does this work?

Your journey will begin within the Academy Team, where you will be supported and nurtured as you begin your career within the Income Tax Division. This role will provide you with a solid foundation on which to build the knowledge and skills required to grow professionally whilst contributing meaningfully to the public service.

A commitment to continual professional development will enable you to provide our clients with an excellent level of customer service. You will also learn and begin to develop a good technical understanding of Income Tax and National Insurance.

You will have opportunities to progress your journey within the Assessing teams, where you will build on and collect a more detailed technical understanding of Income Tax and National Insurance, where your primary responsibility will be to Income Tax casework.

The time spent securing a solid foundation of technical understanding upon which you will build will help to develop you into a competent and credible Income Tax Officer and secure your future progression opportunities.

### What does that involve?

#### Casework

You will:

- Calculate assessments and coding notices for individual clients ensuring accuracy and compliance with current legislation
- Manage a case allocation for individual clients maintaining progress and resolving matters in a timely and efficient manner
- Building a broad understanding of Income Tax and National Insurance knowledge enabling you to provide a well informed and high standard of customer service across a variety of topics
- Liaise proactively with clients and their agents, handling queries and progressing casework with professionalism and care

- Review accounts for non-corporate clients identifying income and relevant allowable deductions based on the income received
- Develop technical knowledge to handle a diverse range of client types and associated caseworker with confidence
- Communicate effectively with clients by email, telephone and at the public counter ensuring clarity, accuracy and a considerate approach at all times

## Self-Development

You will:

- Work as part of a team contributing to shared objectives and targets, learning from colleagues with varied experience
- Participate and engage in a training programme required to build the technical competencies of an Income Tax Officer
- Continuously expand and develop your Income Tax and National Insurance knowledge staying up to date with legislative changes
- Seek opportunities to further enhance your skills whether through formal learning, coaching or hands on experience with complex casework
- Take the time to reflect on feedback received and your performance using opportunities presented to you to improve your approach and develop confidence in decision making

## Customer Service

You will:

- Provide excellent customer service across multiple channels including face-to-face at our public counters, over the telephone and via email ensuring every interaction is recorded and delivered to a high standard, being helpful and efficient
- Support our clients in completing their income tax returns offering guidance to help them understand their obligations
- Promote the use of online services and assist our clients with the enrolment process and completion of online returns
- Process and assist with the completion of relevant Income Tax Forms
- Develop a broad technical knowledge of Income Tax and National Insurance to enable you to respond to a wide range of client queries with confidence

## Other duties

You will:

- Accurately record and maintain client information on the Income Tax Division's IT system ensuring data accuracy at all times
- Support the Income Tax Division by being agile and flexible in your knowledge and experience undertaking any additional duties required to meet operational needs and contribute to team success
- Adapt to evolving priorities demonstrating a proactive and responsive approach and attitude to new tasks and challenges

## 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 2).

## **Reporting Framework**

The post holder reports to the Assessing Manager (EO). The Assessing Manager is responsible as "Reporting Officer" for the implementation of, and compliance with, the provisions of the Isle of Man Civil Service Qualities Framework Level 2.

As Reporting Officer, the Assessing 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 Review meetings are conducted

## **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 risks or near misses to a responsible manager and/or Health and Safety Review Group of the Income Tax Division.

## **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 business and to uphold such confidences.

## **General Scope**

This document is intended to be a guide to the general scope of duties and 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.

## **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
<b>Credibility</b>		
Have 5 GCSE's at grade C (4) or above (including English Language or equivalent)	<b>D</b>	CV
Have experience in an administrative background within a finance related, client based organisation	<b>D</b>	CV
Have experience of dealing with and answering customer enquiries	<b>D</b>	CV/Interview
Has open conversations	<b>E</b>	Interview
Addresses the issues	<b>E</b>	Interview
Builds supportive relationships	<b>E</b>	Interview
Is professional and credible	<b>E</b>	Interview
<b>Capability</b>		
Have a background knowledge of Manx income tax and National Insurance	<b>D</b>	CV/Interview
A confident friendly manner with a strong focus on customer service	<b>E</b>	CV/Interview
Are a proven team worker with excellent interpersonal skills	<b>E</b>	CV/Interview
Have the ability to communicate effectively in both written and verbal form	<b>E</b>	CV/Interview
Have a good knowledge of IT systems	<b>E</b>	CV/Interview
Have an enquiring mind with good problem solving/analytical abilities	<b>E</b>	CV/Interview/Assessment
Future focused	<b>E</b>	Interview
Makes considered decisions	<b>E</b>	Interview
Encourages innovation and supports change	<b>E</b>	Interview
<b>Character</b>		
Are well organised – able to work independently with the minimum amount of supervision	<b>E</b>	Interview
Are a self-motivated person who is happy to self-develop and is eager to learn more	<b>E</b>	Interview
Have the ability to quickly and accurately assimilate information, particularly that of a technical nature	<b>E</b>	Interview/Assessment
Trusts and is trusted	<b>E</b>	Interview

Has positive energy and drive	<b>E</b>	Interview
Inspires, motivates and empowers	<b>E</b>	Interview
<b>Other requirements</b>		
Isle of Man Worker	<b>D</b>	Application