

Job Description & Person Specification

Customer Service Officer

Income Tax Division - Treasury

What will you do?

You will be responsible for making sure that clients are assessed appropriately, so that they are asked to pay the correct amount of income tax and national insurance, or receive a refund of any overpaid income tax or national insurance. This will include making sure that they are assessed on the right amount of income and that they are allowed the correct deductions and allowances.

What does that involve?

Customer Service

You will:

- Provide excellent customer service at the public counter, telephone and on-line
- Help our clients to complete their income tax returns and understand their responsibilities
- Promote the use of on-line services
- Assist our clients with the enrolment process and completion of on-line returns
- Develop broad income tax and national insurance knowledge to provide excellent customer service on a variety of subjects

Casework

You will:

- Manage a case allocation for individual clients
- Calculate assessments and codes for individual clients
- Liaise with clients and their agents by pro-actively managing casework and queries
- Develop technical knowledge to deal with a variety of different clients and casework
- Correspond with clients on-line, on the phone and at the public counter

Self-Development

You will:

- Work as part of a team
- Participate in a training programme to develop the technical skills of an Assessing Officer
- Continuously develop your income tax and national insurance knowledge

Other duties

You will:

- Record and maintain client information on the Income Tax Division's IT system ensuring accuracy
- Support the Income Tax Division by undertaking any other duties required

All Customer Services Officers are expected to rotate into the assessing team to gain more detailed technical understanding of income tax and national insurance where your primary responsibility will be income tax casework.

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).

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.

Reporting Framework

The post holder reports to the Assessing Manager (EO).

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