



**Job Title:** IST Tax Scan Specialist  
**Department:** Tax  
**Reports to:** IST Tax Manager  
**Level:** Full-time, Non-exempt  
**Last updated:** 5/13/22

### **Summary of Responsibilities:**

Provide a high level of support to all tax team members that will allow the Partners, Principals, Managers and fellow team members to be successful. Proactive and energetic, meeting deadlines in a timely manner. Develop a strong knowledge of the processes and software used to produce work for the tax department. Participate and communicate in PGP meetings. Lead process improvements for the tax department.

### **Essential Functions:**

- Receive and initiate tracking of all Organizers and tax packages from clients in XCM tracking software
- Process all client source documents, target, scan, autoflow, review, remove targets, set up files, manage filing system of client folders.
- Funnel, Scan and autoflow all paperless (electronically transmitted) tax documents. Sending communication to CST when process has been completed
- Process all overseas Outsource work following the designated Best Practices
- Process all extensions as required by due date, manage filing of all certified mailing cards.
- Process client Engagement Letters as required/requested.
- Support CST administrative support needs.
- Front desk coverage as scheduled.

### **Secondary Responsibilities:**

- Assist with tax return assembly as needed.
- Process and review electronically transmitted tax returns.
- Process overnight packages as requested.
- Assist in processing all outgoing mail.
- Complete errands and request from tax team.
- Daily maintenance of office space as needed.

### **Education, Experience and Skills:**

- Minimum 1 years relevant work experience.
- Strong organizational skills and multi-tasking skills.
- Excellent written and verbal communication skills.
- Intermediate skill level with Microsoft Outlook, Word, and Excel.

### **Expectations:**

- Respect and earn the respect of fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with manager and partners.
- Perform work with confidence and pride, follow through to completion.
- Dependable.
- Make informed decisions – discuss with manager when needed.
- Grow and learn from past mistakes.
- Work in a safe, clean and employee friendly atmosphere.
- Work personal/professional development plan.
- Must have flexibility with work schedule. Comfortable interacting with professionals at all levels, internally and externally.
- Set priorities and meet deadlines.
- Work well in team environment.
- Operation of general office machines.

### **Working Conditions:**

- Minimal hazards.
- General office working conditions.
- Periodic evening and/or weekend work.

*The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this job. It is not intended to be an exhaustive list of all duties and responsibilities required of individuals in this job. Other duties may be assigned as determined by management. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities of this job.*

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, nursing and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability, or any other protected status in accordance with all applicable federal, state and local laws.

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