



Your people. Our priority.®

Tax Filing Specialist

About Integrity Data

We help employers care for their people by delivering comprehensive HR and Payroll solutions for Microsoft Dynamics. Headquartered in downtown Lincoln, IL, and celebrating 25 years in business, Integrity Data, Inc. serves over 12,000 organizations representing more than 4 million employees worldwide. From small businesses to some of the largest and fastest growing organizations, your people are our priority.

Our team is made of professionals, creatives, accountants, obsessive-compulsive, fun, intelligent, equipped, results-oriented and kind-hearted individuals who seek to provide the best they can on a daily basis. We care enough to: operate with excellence, be trustworthy and accountable, build meaningful business relationships, be kind and caring, be forward thinking and continuously innovating, and enjoy the journey.

We are committed to creating great customer experiences at every touch-point that we offer: our software, our support, our service and our people. We love what we do and we enjoy who we work with.

Position Overview

The Tax Filing Specialist goal is to assure customer success with Integrity Data's products and services. With a strong focus on delivering excellent customer service, the Tax Filing Specialist leads the process of customer payroll tax filing periods from gathering data to submission. This position also assists with payroll implementations as needed.

Employment Details

- Status: Full time, Regular
- Department: Customer Success
- Reports To: Service Manager
- 40-hour work week: Office hours are Monday through Friday from 8 a.m. - 5 p.m. Central

Essential Functions

Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

- Primary service focus: Integrity Data's tax services
- Efficiently prepare and file timely tax filings and deposits on the behalf of customers
 - Secure an IRS Form 8655 for each customer
 - Review monthly PTM invoices and notify Finance Team to process exception fee billing to customers

- Perform year-end tax services requested by customers (e.g.: W2 fulfillment)
- Perform setup and onboarding steps for new tax filing customers
 - Assist Payroll Implementation Consultants with complex tax setups
- Analyze data to reduce filing errors with state and local agencies
- Coordinate responses and resolution of federal and/or state payroll tax notices received by customers
 - Provide subject matter expertise on tax solutions
 - Tier 3 level support for external customers
- Ensure adherence to tax reconciliation and deposit controls
 - Identify and drive best practices for tax administrations
 - Provide tax filing expertise to customers, partners, and internal teams
- Assist with Payroll NOW implementations, onboarding and training as needed

Required Education and Experience

- Bachelor’s degree in business or payroll or equivalent experience
- Real-world tax and payroll experience dealing with:
 - Process end-of-month payroll including reporting and tax payments
 - Quarterly and annual reporting
- Solid understanding of Microsoft Office Suite applications

Preferred Education and Experience

- Payroll certification (American Payroll Association) CPP/FPC

Qualifications

- Enthusiastically comply with the Company’s Core Values
- High level understanding of tax processes
- Excellent verbal and written communication skills. Able to articulate thoughts and concepts clearly with the ability to actively listen
- Ability to be self-directed and work within a team; consistently meeting team deadlines
- Ability to manage multiple projects simultaneously
- Skilled at finding alternate solutions to challenges
- Empathetic to the customers’ needs
- High integrity and dependability and attention to detail
- Ability to work in a fast-paced environment

Physical Demands

<i>Stand:</i>	O
<i>Sit:</i>	C
<i>Walk:</i>	O
<i>Run:</i>	N
<i>Reach outward:</i>	C
<i>Reach Above Shoulder:</i>	O
<i>Climb (stairs/ladders):</i>	O
<i>Crawl:</i>	N
<i>Stoop, kneel, or crouch:</i>	O

<i>Bend:</i>	F
<i>Talk</i>	C
<i>Hearing/Listening</i>	C
<i>Carry/lift 0-10 lbs.:</i>	F
<i>Carry/lift 11-20 lbs.:</i>	O
<i>Carry/lift 21-50 lbs.:</i>	N
<i>Carry/lift 51-100 lbs.:</i>	N
<i>Carry/lift 100+ lbs.:</i>	N
<i>Push/Pull 0-12 lbs.:</i>	O

<i>Push/Pull 13-25 lbs.:</i>	N
<i>Push/Pull 26-40 lbs.:</i>	N

<i>Push/Pull 41-100 lbs.:</i>	N
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N (Not Applicable) Activity is not applicable to this occupation.

O (Occasionally) Occupation requires this activity up to 33% of the time (0 - 2.5+ hrs/day)

F (Frequently) Occupation requires this activity from 33% - 66% of the time (2.5 - 5.5+ hrs/day)

C (Constantly) Occupation requires this activity more than 66% of the time (5.5+ hrs/day)

Benefits

- Major Medical Group Insurance (optional; starts first day of the month following the 30th day of employment)
- Health Reimbursement Arrangement (must participate in Major Medical Group Insurance to be eligible)
- Flex Spending Account/Dependent Care Account (optional)
- Voluntary vision and dental insurance
- Short-Term and Long-Term Disability Insurance (Employer Paid)
- Life Insurance (Employer Paid)
- 401(k) Plan (6 month waiting period, 100% vested upon enrollment)
- Six (6) paid holidays as described in employee handbook
- PTO Plan as described in employee handbook

If this sounds like a great fit for you, please visit integrity-data.com/careers.