

## Job Series Matrix

<b>Job Function:</b> Finance	<b>Job Family:</b> Tax - Professional
<b>Job Family Summary:</b> Perform or manage tax accounting activities to ensure integrity, compliance, and reporting in accordance with U.S. and state tax regulations and requirements.	
<b>Job Title:</b> Tax Analyst III	<b>Job Title:</b> Tax Analyst IV
<b>Job Code:</b> F1857P	<b>Job Code:</b> F1858P
<b>Grade Level:</b> 57 <b>Exemption:</b> Exempt	<b>Grade Level:</b> 58 <b>Exemption:</b> Exempt
<b>Effective/Revision Date:</b> January 2017	<b>Effective/Revision Date:</b> January 2017
<b>Job Summary</b>	<b>Job Summary</b>
Facilitate the implementation of plans and procedures for the collection and payment of withholding tax. Interpret federal and state withholding tax regulations as they relate to various withholding and reporting requirements, including W-2s and 1042 Alien Tax and compensation reporting.	Facilitate Harvard's tax accounting and reporting activities in accordance with U.S. and state tax requirements. Provide guidance to schools/units on tax compliance.
<b>Core Duties</b>	<b>Core Duties</b>
<ul style="list-style-type: none"> <li>• Review, reconcile, and analyze daily, quarterly and annual tax filings; process refunds</li> <li>• Perform PeopleSoft, W2 and ADP tax file testing</li> <li>• Oversee generation of tax filings and W2's through vendor; manage vendor relationship</li> <li>• Review and prepare tax returns for outside payrolls; process associated tax payments</li> <li>• Review, create and reconcile 1042S tax reporting</li> <li>• Reconcile tax accounts, identify variances, and verify the accuracy of journal entries to the general ledger</li> <li>• Assist Senior Manager for Tax Reporting in preparation of Executive level compensation reporting for the University Compensation Committee and the Affiliate tax return disclosure requirements</li> <li>• Ensure financial compliance with University's policies and procedures, accounting disclosure requirements and applicable legal rules and regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Responsible for tax analysis and reporting for assigned sections of Harvard's tax disclosure forms such as 990's</li> <li>• May function as subject matter expert or tax project lead</li> <li>• Collaborate with university financial administrators to identify potential taxable income; determine proper tax treatment</li> <li>• Advise schools/units to design and implement procedures to ensure compliance with tax reporting requirements, particularly in regards to unrelated business taxable income</li> <li>• Document and continuously reevaluate Harvard's tax positions, policies, and procedures, in consultation with the Office of the General Counsel and external advisors</li> <li>• Provide staff mentoring and training</li> <li>• Ensure financial compliance with University's policies and procedures, accounting disclosure requirements and applicable legal rules and regulations</li> </ul>

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Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 5 years' experience in accounting, tax or finance</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 7 years' experience in accounting, tax or finance</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of basic accounting principles, budget management, financial analysis and financial modeling</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>• Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>• Advanced knowledge of basic accounting principles, budget management, financial analysis and financial modeling</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>
Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements
Working Conditions	Working Conditions
<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>

## Job Series Matrix

<b>Job Function:</b> Finance	<b>Job Family:</b> Tax - Management
<b>Job Family Summary:</b> Perform or manage tax accounting activities to ensure integrity, compliance, and reporting in accordance with U.S. and state tax regulations and requirements.	
<b>Job Title:</b> Tax Mgt V	<b>Job Title:</b> Tax Mgt VI
<b>Job Code:</b> F1859M	<b>Job Code:</b> F1860M
<b>Grade Level:</b> 59 <b>Exemption:</b> Exempt	<b>Grade Level:</b> 60 <b>Exemption:</b> Exempt
<b>Effective/Revision Date:</b> January 2017	<b>Effective/Revision Date:</b> January 2017
<b>Job Summary</b>	
Manage tax accounting and reporting activities in accordance with U.S. and state tax requirements. Provide guidance to schools/units on tax compliance.	Oversee the University's tax accounting and reporting to ensure compliance with federal and state tax requirements.
<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Oversee the tax analysis and reporting for assigned sections of Harvard's tax disclosure forms such as 990s and other returns</li> <li>• Proactively identify activities that generate potentially taxable income through specialized financial analysis and determine appropriate tax treatment</li> <li>• Develop and monitor effective tax processes and systems to maintain controls and support financial planning; assist schools and units with developing and implementing procedures to ensure compliance</li> <li>• Serve as a key resource for tax policies, may provide training to clients and staff</li> <li>• Collaborate with university-wide finance leadership to continuously improve tax policies, processes and procedures</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Direct and oversee preparation of various University wide tax filings and supporting tax analyses</li> <li>• Stay current on developments affective the University's tax reporting; advise senior financial administrators on domestic and international reporting obligations</li> <li>• Collaborate with Harvard Management Company and Global Support Services to ensure consistent communication and alignment on key tax reporting issues</li> <li>• Work with external auditors and tax consultants to ensure compliant University reporting requirements; manage ongoing relationships with all external consultants and advisors</li> <li>• Establish goals and implement new initiatives; develop and implement tax accounting and reporting policies and procedures</li> <li>• Serve as a key resource for staff on strategic financial operational planning</li> <li>• Collaborate with University-wide finance leadership to develop financial processes, policies and procedures</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>

## Job Series Matrix

Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required;</li> <li>• Minimum of 8 years' experience in accounting, tax or finance</li> <li>• Supervisory experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 10 years' experience in accounting, tax or finance</li> <li>• Supervisory experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• MBA or advanced degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced debt and investment management</li> </ul>	<ul style="list-style-type: none"> <li>• MBA or advanced degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced debt and investment management</li> </ul>
Certificates and Licenses	Certificates and Licenses
<ul style="list-style-type: none"> <li>• CPA preferred</li> </ul>	<ul style="list-style-type: none"> <li>• CPA preferred</li> </ul>
Physical Requirements	Physical Requirements
Working Conditions	Working Conditions
<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>