

Iowa Department of Administrative Services – Human Resources Enterprise
Job Classification Description

Revenue Examiner 3

Definition

Directs the office examination of tax returns for individual, franchise, corporation, inheritance, withholding, sales, use, motor vehicle fuel, and other taxes administered by the Iowa Department of Revenue; participates in the initial taxpayer appeal process; provides training; performs related work as required.

The work examples and competencies listed below are for illustrative purposes only and not intended to be the primary basis for position classification decisions.

Work Examples

Assists supervisor by performing such duties as instructing employees, answering questions, distributing and balancing the workload, and checking work; may make suggestions on selection, promotions, and reassignments.

Coordinates complex office examination projects and programs to ensure timely completion.

Performs examinations of complex tax returns and related documents to determine completeness, correctness, and compliance with specific tax laws and regulations.

Reviews office examinations under one or more of the office examination programs of tax returns (individual, franchise, corporation, sales, use, inheritance, withholding, motor vehicle fuel) and other taxes administered by the Iowa Department of Revenue to ensure mathematical accuracy, that application of laws and department policies have been adhered to, and/or to determine if additional specific information needs to be requested from the taxpayer.

Participates in the initial taxpayer appeal process by assisting in the preparation of a fact sheet for the case that involves detailing lack of compliance with laws, rules, and/or procedures.

Competencies Required

Knowledge:

- Customer and Personal Service — Principles and processes for providing customer and personal service. This includes customer needs assessment, meeting quality standards for services, and evaluating customer satisfaction.
- Law and Government — Laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.
- Clerical — Administrative and clerical procedures and systems including word processing, managing files and records, stenography and transcription, designing forms, and other office procedures and terminology

Abilities:

- Inductive Reasoning — Combine pieces of information to form general rules or conclusions.

- Deductive Reasoning — Apply general rules to specific problems to produce answers that make sense.
- Oral Comprehension — Listen to and understand information and ideas presented through spoken words and sentences.
- Oral Expression — Communicate information and ideas in speaking so others will understand. I
- Problem Sensitivity — Tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.

Skills:

- Active Listening — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Reading Comprehension — Understanding written sentences and paragraphs in work related documents.
- Speaking — Talking to others to convey information effectively.
- Writing — Communicating effectively in writing as appropriate for the needs of the audience.

Minimum Qualification Requirements

Applicants must meet at least one of the following minimum requirements to qualify for positions in this job classification:

- 1) Graduation from an accredited four-year college or university with a bachelor's degree in any field and experience equal to two years of full-time work in tax, accounting, bookkeeping, auditing, insurance, analysis of financial or business forms and data, or answering technical or tax-related questions.
- 2) All of the following (a and b):
 - a. One year of full-time work experience (as described in number one); and
 - b. A total of five years of education and/or full-time experience (as described in number one), where thirty semester hours of accredited college or university course work in any field equals one year of full-time experience.
- 3) Current, continuous experience in the state executive branch that includes experience equal to five years of full-time work in tax, accounting, bookkeeping, auditing, insurance, analysis of financial or business forms and data, or answering technical or tax-related questions.
- 4) Current, continuous experience in the state executive branch that includes experience equal to eighteen months of full-time work as a Revenue Examiner 2.

Notes

Travel, including overnight travel, may be required for positions in this class. Employees must arrange transportation to and from assigned work areas.

Effective date: 09/22 RH