

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

## Taxpayer Service Specialist 3

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### Definition

Under general supervision, provides authoritative technical and procedural information in person, over the telephone, or via written correspondence to a variety of taxpayers and/or their representatives; performs related duties 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.

Assists and advises taxpayers in meeting their Iowa tax obligations; assistance is technical and covers a wide range of detailed tax information, including individual and corporate income, excise, inheritance, fiduciary, and employment taxes, as well as many elements of all other tax types.

Interviews taxpayers to determine their tax situation.

Determines what tax advice is needed and explains probable consequences of various courses of action open to taxpayers for the current and other tax years.

Assists taxpayers in preparing tax returns, presents options available, and explains the consequences of courses of action; explains to taxpayers the collection and examination processes; advises taxpayers as to effective ways to establish and maintain records relating to tax obligations.

Resolves sensitive and difficult Taxpayer Service contacts and correspondence; examples include correspondence for signature of the Governor's Office and that of the Director, legislators, or irate taxpayers; confers with taxpayers, with or without prearrangement, and applies informed judgment in arriving at an appropriate conclusion for the taxpayer.

Serves as technical backup for personnel assigned to Taxpayer Service by researching difficult tax law or procedural questions which frequently involve issues not clearly defined.

Makes personal and media appearances to inform the public on tax law and policy and procedures.

Instructs taxpayer education programs (e.g., tax practitioner institutes, small business workshops).

### Competencies Required

Knowledge:

- Customer Service – Principles and processes for providing customer services, including 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.

- English Language – The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Economics and Accounting – Economic and accounting principles and practices, the financial markets, banking, and the analysis and reporting of financial data.
- Clerical Procedures – Word processing, managing files and records, designing forms, and other office procedures and terminology.

**Abilities:**

- Deductive Reasoning – Apply general rules to specific problems to produce answers that make sense.
- Inductive Reasoning – Combine pieces of information to form general rules or conclusions.
- 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.
- 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.
- Written Expression – Communicate information and ideas in writing so others will understand.
- Written Comprehension – Read and understand information and ideas presented in writing.

**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.
- Active Learning – Understanding the implications of new information for both current and future problem-solving and decision-making.

**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 degree in accounting, finance, business administration, or a related field, and experience equal to three 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. Three years of full-time work experience in tax, accounting, bookkeeping, auditing, insurance, analysis of financial or business forms and data, or answering technical or tax-related questions; and
  - b. A total of four years of education and/or full-time experience (as described in part a), where thirty semester hours of accredited college or university course work in accounting, finance, business administration, or a related field equals one year of full-time experience.
- 3) Current, continuous experience in the state executive branch that includes three years of full-time work as a Taxpayer Service Specialist 1; two years of full-time work as a Taxpayer Service Specialist 2, Revenue Examiner 2, or Revenue Agent 2; or one year of full-time work as a Revenue Examiner 3 or Revenue Auditor 2.

*Effective date: 05/23 SA*