

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

Technical Tax Specialist 1

Definition

In a trainee capacity, assists in researching, analyzing, developing, and disseminating tax policy issues of limited complexity; 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

Researches the potential impact on established policies based upon state legislation, federal law changes, court decisions, and all other related tax matters.

On a limited basis, explains revenue policy to taxpayers, federal authorities, and employees to clarify or explain policies.

Reviews proposed legislation to determine potential effects on agency and general public by working in conjunction with other agency divisions.

Reviews formal written statements of tax rulings and tax policies which affect taxpayers on non-complex existing tax policy; interprets laws and regulations pertinent to the development of assigned tax policy statements; develops written statements to clarify issues of law for taxpayers; submits statements to a higher-level tax specialist for approval.

Assists in identifying needs for requested state legislation and preparing documentation by researching current legislation that may be involved, the impact it will have on the Department of Revenue and the general public, and making a recommendation as to its validity.

Assists in developing and maintaining rules to reflect changes in tax policy to update staff and general public on current tax policy.

Writes rules and policy and disseminates to staff and the general public via newsletters or bulletins.

Provides technical tax policy data such as that which will have an impact on state revenues in order to develop a revenue forecasting model and assessment of revenue needs by reviewing new legislation, proposed legislation, or policy changes.

Maintains technical tax bulletins for internal and external purposes in order to alert staff and the general public to new or revised tax policies.

Assists, upon request from higher level specialists, in the preparation of information for the Executive and Legislative Branches by gathering data, including effects of changes on state revenues and information from other states using the policy.

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) All of the following (a and b):
 - a. Graduation from an accredited four-year college or university with a degree including at least nine semester hours of accounting coursework; and
 - b. Three years of full-time work experience in professional accounting or auditing.
- 2) All of the following (a and b):
 - a. Three years of full-time work experience in professional accounting or auditing; and
 - b. A total of four years of education and/or full-time experience (as described in number one), where thirty semester hours of accredited college or university course work (as described in number one) equals one year of full-time experience.
- 3) Graduation from an accredited college or university with a master's degree in accounting or business administration and one year of full-time work experience in professional accounting or auditing.
- 4) Possession of a Certified Public Accountant (CPA) certificate and one year of full-time work experience in professional accounting or auditing.
- 5) Graduation from an accredited law school.
- 6) Current, continuous experience in the state executive branch that includes three years of full-time work as a Revenue Examiner 2, Statistical Research Analyst 2, or Management Analyst 2
- 7) Current, continuous experience in the state executive branch that includes two years of full-time work as a Revenue Auditor 2, Revenue Examiner 3, or Statistical Research Analyst 3.
- 8) Current, continuous experience in the state executive branch that includes eighteen months of full-time work as a Revenue Auditor 3.

Effective date: 09/22 RH