

IOWA DEPARTMENT OF ADMINISTRATIVE SERVICES ▼
HUMAN RESOURCES ENTERPRISE
TAX PERFORMANCE SYSTEM ANALYST

DEFINITION

Performs professional level tax accounting work involving Unemployment Insurance (UI) tax procedures, reviewing/evaluating samples, making program improvement recommendations and conducting annual tax performance systems review required by the U.S. Department of Labor (DOL) for funding purposes; performs related work as required.

The Work Examples and Competencies listed are for illustrative purposes only and not intended to be the primary basis for position classification decisions.

WORK EXAMPLES

Annually conducts a sample review of Unemployment Insurance tax operation using Tax Performance System (TPS) methodology required by the U.S. Dept of Labor (DOL). Reviews of random work samples to include benefit charging, bank statements, report processing, reimbursable billings, contributory billings, collections, cashing, cash receipts, suspense items, credits, field audit, tax rates, report delinquency, and status including inactive, new, successor accounts. Sample findings are sent electronically to DOL using a coding system.

Annually conducts a system review which examines tax systems for the existence of proper internal controls, proper process controls, and to identify any risky procedures. Methodology includes review of policy/written instructions and analysis of workflow/procedures using employee observation and interviews.

Collaborates with agency staff to develop continuous improvement methods in the tax operations as a part of the agency's State Quality Service Plan, the document used by the U.S. DOL to award Iowa's annual UI base grant.

Collects/examines computed measures to identify trends in the timeliness and completeness of Iowa's UI tax operation; areas reviewed are status determinations, report delinquency, collections, and field audits which, based on aggregate information, are indicators of the timeliness and completeness of UI tax transactions; prepares quarterly written documents, including graphs/charts to show current/past performance and meets with tax management to report /discuss findings.

Recommends/initiates new projects for correcting or improving tax program operations based on TPS review conclusions; designs/recommends special reviews to identify and research additional tax program areas in need of improvement and participates in program improvement planning, design and implementation.

Prepares annual report of the performance of UI's tax operation for presentation to the agency director and DOL; preparation involves compilation, analysis and documentation of the findings from the tax program review, acceptance sampling, computed measures, surveys and includes formal recommendations for corrective action of areas in which the program review was unable to verify that established DOL standards were met or state procedures were followed.

Coordinates with data processing systems analyst and other tax personnel the entry/maintenance of data used for DOL reporting, acceptance sampling, computed measures, and other statistical reports so that DOL can access and measure performance.

Monitors/researches other state and federal tax program initiatives and procedures for communication to management to assess possible program improvements in Iowa.

As part of a TPS review team, travels to other states to participate in tax operation reviews and exchange of ideas and methods; prepares for and organizes hosting of TPS review team on a quad-annual basis.

COMPETENCIES REQUIRED

Knowledge of the federal tax performance system program policies, procedures and reporting requirements.

Knowledge of functions of the UI Tax system/understanding of the operation of other tax functions.

Knowledge of generally accepted accounting principles (GAAP) and generally accepted auditing standards (GAAS).

Knowledge of laws, legal codes, precedents, legal practices, government regulations, executive orders, agency rules.

Knowledge of government organization/functions related to tax accounting work.

Knowledge of Iowa's unemployment tax and accounting systems.

Skill in the operation and use of personal computers, productivity software and software unique to the federal tax performance system program.

Skill in statistical analysis and sampling techniques.

Ability to conduct compliance, efficiency and program audits.

Ability to perform detailed work involving the application of accounting theory to routine accounting or auditing assignments.

Works and communicates with internal and external clients and customers to meet their needs.

Ability to collect, organize and analyze tax performance systems information and identify problems.

Ability to identify and analyze problems, based on evidence presented and applicable laws, rules and precedents, to distinguish between relevant and irrelevant information; to make logical decisions, and provide solutions to individual and organizational problems.

Ability to evaluate difficult accounting problems and analyze/interpret complex accounting records/reports.

Ability to establish program objectives or performance goals and to assess progress toward their achievement.

Ability to analyze workflow and process improvement.

Displays high standards of ethical conduct. Exhibits honesty and integrity. Refrains from theft-related, dishonest or unethical behavior.

Works and communicates with internal and external clients and customers to meet their needs in a polite, courteous, and cooperative manner. Committed to quality service.

Displays a high level of initiative, effort and commitment towards completing assignments efficiently. Works with minimal supervision. Demonstrates responsible behavior and attention to detail.

Responds appropriately to supervision. Follows policy and cooperates with supervisors.

Aligns behavior with the needs, priorities and goals of the organization.

Encourages and facilitates cooperation, pride, trust, and group identity. Fosters commitment and team spirit.

Expresses information to individuals or groups effectively, taking into account the audience and nature of the information. Listens to others and responds appropriately.

EDUCATION, EXPERIENCE, AND SPECIAL REQUIREMENTS

Graduation from an accredited college or university with a degree in accounting, statistics, finance, mathematics, and two years' experience in tax accounting, tax auditing or closely related field;

OR

an equivalent combination of experience and education substituting one year of the required experience for each (30 semester hours or 1 year) of the required education;

OR

employees with current continuous experience in the state executive branch that includes experience equal to twenty-four months of full-time work as a Field Auditor, Employer Liability Specialist, or Job Insurance Quality Auditor 2 shall be considered qualified.

Effective Date: 11/06 JN