

IOWA DEPARTMENT OF ADMINISTRATIVE SERVICES ▼  
HUMAN RESOURCES ENTERPRISE  
**TAXPAYER SERVICE SPECIALIST**

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**DEFINITION**

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

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

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, TCE and VITA.

**COMPETENCIES REQUIRED**

Knowledge of tax code and regulations applicable to individual and corporate income, excise, inheritance, fiduciary, and employment taxes as well as certain portions applicable to all other types of taxes to assist and advise taxpayers in meeting them in Iowa tax obligations.

Knowledge of tax analysis techniques in order to apply appropriate tax laws and regulations to the individual case by considering the taxpayer's complete tax situations and by isolating potential tax issues.

Knowledge of basic accounting principles and related knowledge of general and local business practices to advise taxpayers of their tax obligations.

Knowledge of interviewing techniques necessary to determine the nature of assistance needed and to obtain information of sensitive nature.

Knowledge of interviewing techniques to meet and deal with a cross-section of the taxpaying public, and effectively convey necessary technical information.

Knowledge of Iowa Department of Revenue processing flow/ functions for differing tax returns and reports to assist taxpayers in resolving systemic problems or in identification of the most appropriate source of assistance or problem resolution.

Ability to understand Iowa and federal tax forms, notices, and other documents to assist taxpayers in the preparation of tax returns and resolution of account inquiries.

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. Makes an effort to follow policy and cooperate 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 four-year college or university with a minimum of nine semester or equivalent course work hours in accounting, business administration, or finance and the equivalent of four years full-time experience in tax accounting, tax preparation, tax examining or auditing and demonstrated knowledge and experience in no fewer than four different taxing authorities administered by the Department of Revenue;

OR

an equivalent combination of education and experience, substituting the equivalent of one year of full-time professional accounting and/or auditing work experience or tax preparation work experience for one year of the required education to a maximum substitution of four years; no substitution for the nine semester or equivalent hours of accounting, business administration or finance coursework and demonstrated knowledge and experience in no fewer than four different taxing authorities administered by the Department of Revenue;

OR

employees with current continuous experience in the state executive branch that includes the equivalent of one year of full-time work as a Revenue Examiner 2, Revenue Auditor 2, and Revenue Agent 2, with demonstrated knowledge and experience in no fewer than four different taxing authorities administered by the Department of Revenue shall be considered as qualified.

Effective Date:     9/03     VA