|  |  |  |
| --- | --- | --- |
| CS-214  Rev 11/2013 |  | Position Code |
|  | State of Michigan **Civil Service Commission**  Capitol Commons Center, P.O. Box 30002  Lansing, MI 48909 |  |
|  | POSITION DESCRIPTION |  |

|  |  |
| --- | --- |
| This position description serves as the official classification document of record for this position. Please complete this form as accurately as you can as the position description is used to determine the proper classification of the position. | |
| 2. Employee’s Name (Last, First, M.I.) | 8. Department/Agency |
|  | TREASURY |
| 3.Employee Identification Number | 9. Bureau (Institution, Board, or Commission) |
|  | TAX COMPLIANCE BUREAU |
| 4.Civil Service Position Code Description | 10. Division |
| DEPARTMENTAL MANAGER 14 | DISCOVERY AND TAX ENFORCEMENT DIVISION |
| 5.Working Title (What the agency calls the position) | 11. Section |
| DEPARTMENTAL MANAGER 14 |  |
| 6.Name and Position Code Description of Direct Supervisor | 12. Unit |
| JENNIFER STEVENSON  STATE ADMINISTRATOR 15 |  |
| 7.Name and Position Code Description of Second Level Supervisor | 13. Work Location (City and Address)/Hours of Work |
| Kathy McCarthy, State Division Administrator 17 | Operations Center, 7285 Parsons Drive, Dimondale MI 48821  M-F 8:00-500 |
| 14. General Summary of Function/Purpose of Position | |
| This position manages and coordinates the activities of analysts and calculations assistants in developing and recommending projects to identify non-compliance or under reporting in state and city income tax. The Departmental Manager is expected to promote and maintain an environment conducive to continuous quality improvement to encourage employee ideas, input and teamwork  Oversee activities of data analysts primarily responsible for conducting income tax projects, both current year filed and post year projects. The activities include obtaining third party data and directing the staff in evaluating data to identify under reporting and non-filers for state and city income taxes. Oversee the proper processing of state and city returns.  Research and recommend new queries, data sources, and outside resources to continuously improve processes and procedures and provide excellent taxpayer service. Participate and lead in IRS Summit initiatives to ensure they are implemented. | |
| 15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.  List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent. | |
| Duty 1 **General Summary of Duty 1 % of Time 50**  Manage and coordinate the day-to-day operations of analysts and assist in query development. Recommend new ways, and encourage innovation to eliminate contacting those taxpayers that do not need to be contacted, while still safeguarding state and city assets from erred returns and fraud. | |
| **Individual tasks related to the duty.**   * Develop and modify, as needed, all positions * Conduct interviews as needed to fill vacant positions * Develop and maintain annual staff evaluations * Set, review and approve bi-weekly staff schedule, including approval of timesheets, annual leave, and sick leave * Identify staff development needs and ensure that training is obtained * Develop a thorough knowledge of project assignments. * Identify critical, essential duties and assign back-up employees to these duties. * Provide query assistance and support | |
| Duty 2 **General Summary of Duty 2 % of Time 30**  Manage and direct the activities calculation assistants responsible for current and post income tax projects. | |
| **Individual tasks related to the duty.**   * Train and monitor the review of returns to ensure fair and consistent treatment of taxpayers * Monitor staff production in order to ensure quality taxpayer service. * Approve refunds when over a certain tolerance | |

|  |
| --- |
| Duty 3 **General Summary of Duty 3 % of Time 20**  Various, to be assigned |
| **Individual tasks related to the duty.**   * Conduct research as directed by DM 15 * Attend meetings * Participate in FTA initiatives * Participate in IRS Summit initiatives * Report and consult with cities on income tax initiatives |
| Duty 4 **General Summary of Duty 4 % of Time** |
| **Individual tasks related to the duty.** |

|  |
| --- |
| Duty 5 **General Summary of Duty 5 % of Time** |
| **Individual tasks related to the duty.** |
| Duty 6 **General Summary of Duty 6 % of Time** |
| **Individual tasks related to the duty.** |

|  |  |  |  |
| --- | --- | --- | --- |
| 16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.  Decisions on application of tax statutes and appropriate responses on tax related matters to taxpayers, their representatives and tax practitioners. Decisions on general staffing, allocating work, realignment of resources to address backlogs, the propriety of tax assessments and disclosures. | | | |
| 17. Describe the types of decisions that require the supervisor’s review.  All decisions that could have a negative impact on the Department’s policies, practices, or procedures. Decisions where precedent has not been established. | | | |
| 18. What kind of physical effort is used to perform this job? What environmental conditions is this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.  General office setting; lighting, air temperature control. Pushing, pulling and/or lifting up to 25 pounds. Prolonged sitting and standing. Extensive use of computer and related equipment. High exposure to advanced technology. | | | |
| 19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis. (If more than 10, list only classification titles and the number of employees in each classification.) | | | |
| NAME | CLASS TITLE | NAME | CLASS TITLE |
| Vacant | DEPT ANALYST 9-P11 | DAKOTA GOULD | DEPT TECH 7-9 |
| MAUREEN STORIE | DEPT ANALYST 9-P11 | KAMIYIA TERRY | CALC ASST 8 |
| ASHLEY JENKINS | DEPT TECH 7-9 | AUTUMN MARTIN | CALC ASST 8 |
| JUANITA CARLTON | CALC ASST 8 |  |  |
| BRADLEY SAINT-AUBIN | CALC ASST 5-7 |  |  |
| HEATHER MELLON | CALC ASST 5-7 |  |  |
| RONALD LEWIS | CALC ASST 5-7 |  |  |
| 20. This position’s responsibilities for the above-listed employees includes the following (check as many as apply):  **x Complete and sign service ratings. x Assign work.**  **x Provide formal written counseling. x Approve work.**  **x Approve leave requests. x Review work.**  **x Approve time and attendance. x Provide guidance on work methods.**  **x Orally reprimand. x Train employees in the work.** | | | |

|  |
| --- |
| 22. Do you agree with the responses for Items 1 through 20? If not, which items do you disagree with and why?  Yes |
| 23. What are the essential functions of this position?  As supervisor, direct analysts and calculation assistants primarily responsible for conducting income tax projects, both current year filed and post year projects, developing and recommending additional projects to identify current year tax related identity theft refunds and hire and oversee training for new city income tax team. |
| 24. Indicate specifically how the position’s duties and responsibilities have changed since the position was last reviewed.  New position |
| 25. What is the function of the work area and how does this position fit into that function?  Discovery is responsible for conducting tax compliance projects that identify non-filers and under reporters of the various taxes administered by Treasury. Discovery is also responsible for administering the voluntary disclosure program for the department. This position will be primarily responsible for managing several of these projects. |
| 26. What are the minimum education and experience qualifications needed to perform the essential functions of this position? |
| EDUCATION:  Possession of a Bachelor’s Degree in any major. |
| EXPERIENCE:  Four years of professional experience, including two years equivalent to the experienced (P11) level or one year equivalent to the advanced (12) level. |
| KNOWLEDGE, SKILLS, AND ABILITIES:  Thorough knowledge of Michigan Tax Statutes, department policies, procedures and organization, effective in communication skills, both verbal and written. Research and Analytical skills. Computer knowledge. |
| CERTIFICATES, LICENSES, REGISTRATIONS: |
| *NOTE: Civil Service approval of this position does not constitute agreement with or acceptance of the desirable qualifications for this position.* |
| *I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.* |
| **Supervisor’s Signature Date** |
| TO BE FILLED OUT BY APPOINTING AUTHORITY |
| Indicate any exceptions or additions to statements of the employee(s) or supervisors. |
| *I certify that the entries on these pages are accurate and complete.*    **Appointing Authority** **Signature Date** |
| TO BE FILLED OUT BY EMPLOYEE |
| *I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.*    **Employee’s Signature Date** |

**NOTE: Make a copy of this form for your records.**