

**State of Michigan
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code

1. DEPTMGR3I28N

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information 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 CENTRAL PAYROLL
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) Tax Administration Services Bureau
4. Civil Service Position Code Description DEPARTMENTAL MANAGER-3	10. Division Individual Income Tax Division
5. Working Title (What the agency calls the position) Departmental Manager	11. Section Customer Contact
6. Name and Position Code Description of Direct Supervisor DALMAN, MARILYN; STATE ADMINISTRATIVE MANAGER	12. Unit
7. Name and Position Code Description of Second Level Supervisor SNYDER, MELISSA; STATE DIVISION ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 7285 PARSONS RD; DIMONDALE, MI 48821 Monday-Friday 8:00am to 5:00pm

14. General Summary of Function/Purpose of Position

This position is the first line professional manager of professional positions in a complex work area and is responsible for planning, directing, and managing the operations of the Individual Income Tax, Customer Contact Section and Main Line staff. This position ensures proper and consistent application of the Michigan statutes governing the assigned taxes. Functions include:

1. Oversee analyst and supervisor staff in identifying system issues/changes, researching and testing needed to resolve issues to maintain operations.
2. Participates in the development and updating of training materials, procedures, and job aids.
3. Assign, coordinate and outline the work methods of the Contact Center and Main Line staff that assist in resolving taxpayer issues and identifying problems that will result in customer dissatisfaction.
4. Oversee analyst and supervisor work by setting work priorities, determining staffing skills, forecasting, and scheduling work for the Contact Center.
5. Monitors quality assurance and identifies staff development, performance, and training needs.

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:

Percentage: 55

Serve as the primary contact regarding complex issues involving accounts assigned to Individual Income Tax Customer Contact Section. Work closely with the Income Tax State Administrative Manager (SAM15) and Income Tax Division Administrator to resolve issues on taxpayer accounts.

Work in partnership with Individual Income Tax Management Team, the Learning, Quality, and Development Team, and all other areas of the Bureau to resolve taxpayer issues and identify problems that will result in customer dissatisfaction. Directs the development of long-range plans and goals for the section. Research, analyze and formulate sound recommendations regarding a variety of matters, such as contact center processes, issues involving the processing of IIT returns, computer programs, or potential issues with deadlines that will result in customer dissatisfaction.

Individual tasks related to the duty:

- Ensures equal employment opportunity in hiring and promotion in positions selected by individual in this position and selection of staff and recommendations for promotion made by supervisors reporting to this position.
- Evaluates the impact of the employee's areas of responsibility in the overall Tax process and make recommendations for efficiencies and enhancements.
- Directs the work of the analysts by setting work priorities, determining staffing skills, forecasting, and scheduling work for the Contact Center.
- Advise and participate in matters related to the Tax program.
- Develop and maintain methods for tracking and measuring the quality and performance of staff.
- Directs and participates in recommendations regarding policy, process and systems changes for efficiency and effectiveness.
- Direct the development and implementation of new approaches in the contact center processes.
- Prepare reports, presentations, and other materials for use by management.
- Provide problem resolution on complex issues involving accounts assigned to Customer Contact.
- Conduct and attend meetings as necessary.
- Answers questions and identifies problems in procedures and processes.
- Participates in the review and updating of procedures and documentation.
- Participates in the development and implementation of the Contact Center Quality Assurance standards for call handling and the processing of all work items.
- Proactively initiate meetings and communications across Treasury and other areas as appropriate to discuss processing issues and impacts.

Duty 2

General Summary:

Percentage: 25

Direct the overall activities of the Customer Contact Section. Coordinate and assign the daily activities; provide guidance; and ensure adherence with policies, procedures, quality assurance standards and guidelines.

Activities include, in part, the coordination of work assigned to the Section; review of the procedures and processes used in answering customer inquiries and processing work items; ensures systems accurately reflect timeframes and processes within specified service levels.

Individual tasks related to the duty:

- Prepare documentation and reports detailing activities under employee's responsibility.
- Communicate effectively both verbally and in writing with Department staff, other departments, outside agencies, and taxpayers and their representatives.
- Monitor call volumes and backlogs in accordance with Department policies, procedures and guidelines.
- Inform Customer Contact Section Assistant Administrator on a timely basis of sensitive issues, taxpayer complaints, and potential employee integrity or performance concerns.
- Coordinates and conducts special projects around the processing of work items after they have completed processing; looking for compliance and opportunities for increased efficiencies.
- Oversees the performance appraisal process; working with first and second-line supervisors to ensure performance problems are addressed timely and appropriately, and that performance reviews are completed timely.
- Monitor various production reports and discuss with first and second-line supervisors as appropriate; ensure supervisors are addressing with staff as appropriate.
- Monitor the processing of work items and calls, through first and second-line supervisors, to identify any issues and develop ways to resolve them without negative impact on customers or employee morale.
- Ensures that established practices and procedures are being followed by first and second line supervisors.
- Monitors the most complex work items and the work that is of a most sensitive nature. Provides authorization for transactions that, in accord with good internal control, require signatures of supervisor and managers.
- Directs the activities, sets completion goals and monitors the completion of the various work items, keeping administration alerted when projected deadlines will not be met. Identifies problems; and ways in which to improve productivity without significant negative impacts on customer satisfaction.
- Conducts employee performance appraisals.
- Coordinates with other areas Treasury and State of Michigan Departments.

Duty 3

General Summary:

Percentage: 15

Provide direction and supervision to staff under employee's responsibility. Select and assign staff assuring equal employment opportunity in hiring and promotions. Identify staff development and training needs. Ensure that proper labor relations and conditions of employment are maintained. Conduct staff meetings to discuss operating problems, organization, personnel matters, technical problems and the status of programs and projects. Ensure internal controls are maintained and monitored.

Individual tasks related to the duty:

- Reviews work assignments, problems or questions as identified by first and second-line supervisors. Conducts staff meetings to ensure staff is aware of overall goals and objectives. Reviews evaluations made by supervisors in their review of staff work and performance.
- Select and assign staff, ensuring equal employment opportunity in hiring and promotion.
- Monitor work standards and ensure they are being met by all staff.
- Assign, coordinate, and monitor activities, including setting priorities and goals.
- Conduct performance evaluations, including counseling or disciplinary actions, in a timely manner.
- Provide staff with development opportunities, including coaching/mentoring, and provide adequate training opportunities.
- Perform routine managerial and supervisory functions, including approval of leave, coordination of vacations, and scheduling of overtime.
- Oversee training and supervision of staff in all job-related functions.
- Maintain two-way communication with staff through regular staff meetings and other methods.
- Assign tasks, develop schedules, and supervise day-to-day activities.
- Determines the validity of hardship claims and requests remedial action from others in the Department.
- Assures staff responses, verbal and written comply with the Departments policy on disclosure.
- Identifies training needs and works with the training team to ensure needs are met.

Duty 4

General Summary:

Percentage: 5

Other duties as assigned.

Individual tasks related to the duty:

- Leads Project teams as assigned.
- Participates in project teams as assigned.
- Complete various assignments as requested by Assistant Administrator, Administrator or Bureau Director.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

Responsible for determining the methods used to accomplish day to day work priorities, staffing and assigned projects, thereby affecting the Section. Makes independent decisions regarding the approach taken towards complex tasks and in determining alternative methods to resolve complex issues. Makes independent decisions regarding research methodologies used to compile reports and make sound recommendations to management.

Employee makes independent decisions regarding setting work priorities impacting staff, staff development needs, and ensuring that employee's areas of responsibility achieve overall goals and objectives.

Approves refunds within pre-set dollar levels.

17. Describe the types of decisions that require the supervisor's review.

Decisions which result in a major policy change or have a major budgetary impact. New or revised policies and procedures. Approval to fill vacancies, transfer staff or alter office hours. Advise the SAM15 and Income Tax Division Administrator of personnel actions/problems.

Informs SAM15 and Income Tax Division Administrator on a timely basis of any sensitive issues.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

Communicate information to group audiences. Attend conferences, workshops, and seminars regarding new methods and technologies in Contact Centers. The individual must work at a desk for long periods of time with extensive work on a personal computer.

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.

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>
	DEPARTMENTAL ANALYST-E 9		DEPARTMENTAL ANALYST-E P11
	DEPARTMENTAL SUPERVISOR-3 12		DEPARTMENTAL TECHNICIAN-A
	DEPARTMENTAL TECHNICIAN-A		DEPARTMENTAL TECHNICIAN-A 10
	DEPARTMENTAL TECHNICIAN-A 10		DEPARTMENTAL TECHNICIAN-E E9
	DEPARTMENTAL TECHNICIAN-E E9		

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

- | | |
|--|---|
| ☒ Complete and sign service ratings. | ☒ Assign work. |
| ☒ Provide formal written counseling. | ☒ Approve work. |
| ☒ Approve leave requests. | ☒ Review work. |
| ☒ Approve time and attendance. | ☒ Provide guidance on work methods. |
| ☒ Orally reprimand. | ☒ 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?

This position directs the work of the Analyst by setting work priorities, determining staffing skills, forecasting and scheduling calls and work for the Contact Center. This employee serves as a primary contact regarding complex issues involving the Customer Contact Section. This employee ensures that staff releases consistent, accurate tax information to the public, meets objectives for quality, and provides complete responses to all inquiries. Further, this employee oversees and directs daily activities and ensures adherence with policies, procedures, quality assurance standards and guidelines.

The essential duties include all requirements identified in Section 18 of this position description.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

The essential duties of the position have not changed. Updates reflect system modernization and organizational changes.

25. What is the function of the work area and how does this position fit into that function?

The Individual Income Tax Customer Contact Section is the first point of contact for all Individual Income Tax inquiries. The Contact Center responds to all inquiries within the timeframes set by the Department and ensures the quality of the responses.

The Manager serves the Individual Income Tax Customer Contact Section as a first-line manager for planning, scheduling, monitoring quality assurance and identifies staff development and training needs. This position directs the work of the Analyst and contact center staff by setting call and work priorities, determining staffing skills, forecasting and scheduling calls and work assignments. This employee assists the SAM15 and Income Tax Division Administrator in resolving complex issues on accounts; in developing and maintaining quality assurance standards and procedures; The function of the work area is to support the Division and Department objectives. The Contact Center staff responds to over 265,000 telephone inquiries, correspondence and web inquiries from taxpayers annually.

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:

Departmental Manager 14

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:

- Knowledge of the principles and techniques of administrative management; including organization, planning, staffing, training, and reporting.
- Ability to organize and coordinate the work of others.
- Knowledge of training and supervisory techniques.
- Knowledge of Genesys Software (WFM, iWS, iWD, CCPulse).
- Ability to interpret laws, rules and regulations relative to the work.
- Excellent written and verbal communication skills; communicating in a professional manner.
- Ability to assess, evaluate and analyze programs and processes, compile information, and articulate succinctly.
- Ability to manage multiple assignments simultaneously.
- Ability to establish and maintain effective relationships.
- Ability to plan, direct and coordinate work projects and work within a team environment.
- Analytical and problem solving skills.
- Thorough understanding of the techniques needed for effective delegation of authority and responsibility.
- Ability to maintain favorable public relations.

CERTIFICATES, LICENSES, REGISTRATIONS:

FTINPRINT sub-class code. The position has access to Federal Tax Information (FTI).

NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of 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

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

N/A.

I certify that the entries on these pages are accurate and complete.

Appointing Authority

Date

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

Date