

**State of Michigan
Civil Service Commission**
Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code 1.

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 Technician-A	10. Division Technical and Operational Support
5. Working Title (What the agency calls the position) Departmental Technician	11. Section
6. Name and Position Code Description of Direct Supervisor HICKS, GEORGE; DEPARTMENTAL MANAGER	12. Unit Learning, Quality, and Development
7. Name and Position Code Description of Second Level Supervisor SMITH, JENNY; STATE ADMINISTRATIVE MANAGER	13. Work Location (City and Address)/Hours of Work Operations Center, 7285 Parson Drive, Dimondale, MI Monday - Friday 8:00 am to 5:00 pm

14. General Summary of Function/Purpose of Position

The responsibilities of the senior level Learning, Quality, and Development Technician position include: proficiency in more than one tax type (e.g. Individual Income Tax, Sales Use and Withholding Taxes, Michigan Business Tax, Corporate Income Tax, and Business Registration) in order to provide feedback to staff that is appropriate to the systems and procedures used in various taxing sections. The position also requires the ability to develop and conduct staff training relevant to a wide variety of tax laws, call handling skills, return processing procedures and NICE training for new users and super users. The senior level technician is also required to research and interpret statutes, rules and other guidelines in order to provide responses to inquiries from management as well as to coach and train team members. They facilitate communications between technical, processing and quality assurance functions within and between divisions. They must execute and analyze the results of complex queries in SAP, URSA and other legacy systems, including NICE, in order to meet random selection criteria for Quality Assurance purposes.

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: 50

Plan, develop and conduct training.

Individual tasks related to the duty:

- Plan, develop and conduct programs for staff development related to, but not limited to, implementation of new work processes, systems and/or instructions, including "super user" training in some instances.
- Work closely with supervisors and analysts to identify issues for training and remedies for system functionality that are crucial to completing the work of the unit, and develop training and reference materials for new processes and procedures.
- Develop and deliver training that may be tax specific, system specific and/or related to improved quality of processing and customer service in one to one and group settings.
- Identify best practices and recommends changes to business processes and computer system.
- Mastery of the use and navigation of a wide variety of systems/tools used by each area including CRM, SAP, Bridge, URSA, etc.
- Utilize the policies and procedures for each of the taxing areas that apply to the conduct of evaluations and makes recommendations for changes to improve customer service.

Duty 2

General Summary:

Percentage: 20

Serves as a technical resource for team members.

Individual tasks related to the duty:

- Process requests for resolution of customer issues that are technical or complex such as allocation, apportionment, Nexus and other issues.
- Research and interpretation of statutes, policy and understanding the impacts of pending legislation and recent changes in the law.
- Review response with technical services area prior to dissemination of information if necessary.
- Identifies best practices and recommends changes to business processes and computer systems based on statute or law changes.
- Participates in developing scripts/scenarios for system testing and conducts system testing, including the creation tracking and follow-up on remedy tickets created for system issues within assigned area.
- Takes an active role in testing of new technology initiatives.
- Knows where to find and research tax laws and interpret statutes, including their effect on policies and procedures as it relates to customer contact handling and return processing.
- Recommends changes to processes and procedures, processing and general operations including the Departments website and changes in self-service strategies for handling customer contacts.

Duty 3

General Summary:

Percentage: 10

Recommend Business Process Improvements.

Individual tasks related to the duty:

- Primary role in the development and testing of new technology initiatives (example: e-payments for Individual Income Tax).
- Identify best practices and recommends changes to business processes and computer systems.
- Changes could be to processes and procedures, processing and general operations including the Department's website, and changes in self-service strategies for handling customer contacts.
- Participates in developing scripts/scenarios for system testing, and conducts system testing.

Duty 4

General Summary:

Percentage: 10

Develops and executes communication plans and vehicles such as newsletters or fact sheets and broadcast emails, which impact multiple units and/or a broad spectrum of Bureau staff.

Individual tasks related to the duty:

- Develops communication vehicles such as newsletters, broadcast emails, etc., that keep their internal audiences apprised of current changes in the QA process, basic tax processing procedures and other processes that affect a broad spectrum of Bureau staff.
- Responsible for performing complex queries within the Customer Relationship Management (CRM) database, SAP and legacy systems, and summarizes the results.
- Run ad hoc queries requested by the supervisor/manager to assist in determining work assignments for the Treasury Customer Service Representatives (TCSR) in the work area.
- Recommend staff assignments based on a review of the system queries.
- Conduct informational meetings for staff and leadership to communicate changes in policies and procedures and quality assurance processes.
- Sends quality assurance updates using packages in the NICE system.
- Updates monthly proficiency reports to be distributed to Bureau management showing quality assurance scores and productivity measurements of individuals within a given unit or supervisory group.

Duty 5

General Summary:

Percentage: 10

Other duties as assigned.

Individual tasks related to the duty:

- Participate in special projects as assigned within the Division and/or QA unit such as the implementation of Enterprise Work Distribution, Work Force Management, Skills Assessor, etc.
- Participate in special assignments external to the division or unit.

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

Evaluate Bureau staff members calls, correspondence and processing of returns for quality. Plan and develop changes to procedures, computer systems, and training in an effort to enhance overall quality, including new processes and changes to procedures or work rules for all sections within the Bureau. Serve as technical resource for quality within the Bureau including, policy & procedures related to work rules of Bureau staff. Investigates complaints received by Treasury executive office and determines resolution. Recommends communication to Bureau staff on updates and changes to QA policies or procedures.

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

Evaluate Bureau staff members calls, correspondence and processing of returns for quality. Plan and develop changes to procedures, computer systems, and training in an effort to enhance overall quality, including new processes and changes to procedures or work rules for all sections within the Bureau. Serve as technical resource for quality within the Bureau including, policy & procedures related to work rules of Bureau staff. Investigates complaints received by Treasury executive office and determines resolution. Recommends communication to Bureau staff on updates and changes to QA policies or procedures.

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.

The individual must work at a desk for long periods of time. The job requires extensive use of a telephone and personal computer. The individual may need to transport containers weighing between 10 and 20 pounds.

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.

Additional Subordinates

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

- | | |
|---|--|
| <input type="checkbox"/> Complete and sign service ratings. | <input type="checkbox"/> Assign work. |
| <input type="checkbox"/> Provide formal written counseling. | <input type="checkbox"/> Approve work. |
| <input type="checkbox"/> Approve leave requests. | <input type="checkbox"/> Review work. |
| <input type="checkbox"/> Approve time and attendance. | <input type="checkbox"/> Provide guidance on work methods. |
| <input type="checkbox"/> Orally reprimand. | <input type="checkbox"/> 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?

The responsibilities of the senior level Quality Assurance Technician position include: proficiency in more than one tax type (e.g. Individual Income Tax, Sales Use and Withholding Taxes, Michigan Business Tax, Corporate Income Tax, etc.) in order to provide feedback to staff that is appropriate to the systems and procedures used in various taxing units. The position also requires the ability to develop and conduct staff training relevant to a wide variety of tax laws, call handling skills, return processing procedures and NICE training for new users and super users. The senior level technician is also required to research and interpret statutes, rules and other guidelines in order to provide responses to inquiries from management as well as to coach and train team members. They facilitate communications between technical, processing and quality assurance functions within and between divisions. They must execute and analyze the results of complex queries in SAP, URSA and other legacy systems, including NICE, in order to meet random selection criteria for Quality Assurance purposes.

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

No changes.

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

The Administrative Support Division was created during the reorganization of the Tax Processing Bureau as a means providing support to the three taxing divisions in the Bureau. The Division provides basic, non-tax specific services to the other divisions which are Individual Income Tax, Business Taxes and Special Taxes. These services include, but are not limited to, web content development and maintenance quality assurance programs, registration processes, processing of

returned warrants, home heating credits, processing system scheduling, development and implementation of CRM system enhancements.

This position is in the Quality Assurance unit which is responsible for maintaining and improving the quality of those customer interactions that occur within the bureau, making recommendations for improvement in processes and procedures as well.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Education typically acquired through completion of high school.

EXPERIENCE:

Departmental Technician 10

Two years of experience as a supervisor of administrative support activities equivalent to the 9-level in state service.

OR

Two years of experience performing administrative support activities equivalent to the 9-level in state service.

OR

Three years of experience as a technician or paraprofessional, including one year of experience equivalent to the experienced level in state service.

Alternate Education and Experience

Departmental Technician 10

Possession of a Bachelor's degree and one year of professional experience may be substituted for the experience requirement.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Software: NICE, Siebel, FileNet as well as Treasury legacy systems (TREAS, STAR, MARCS and TACS) and/or SAP.
- Tax knowledge in two or more of the major taxes housed within the bureau.
- Ability to coach and help others improve performance.
- Ability to comprehend the big picture level of systems, while at the same time being able to grasp the details needed to properly identify system specifications and testing protocols.

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.

None

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