

**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.

<b>2. Employee's Name (Last, First, M.I.)</b>	<b>8. Department/Agency</b> TREASURY CENTRAL PAYROLL
<b>3. Employee Identification Number</b>	<b>9. Bureau (Institution, Board, or Commission)</b> Tax Administration Service Bureau
<b>4. Civil Service Position Code Description</b> DEPARTMENTAL TECHNICIAN-E	<b>10. Division</b> Technical and Operational Support
<b>5. Working Title (What the agency calls the position)</b> Departmental Technician	<b>11. Section</b>
<b>6. Name and Position Code Description of Direct Supervisor</b> VACANT; DEPARTMENTAL MANAGER-3	<b>12. Unit</b> Quality Assurance
<b>7. Name and Position Code Description of Second Level Supervisor</b> SMITH, JENNY; STATE ADMINISTRATIVE MANAGER-1	<b>13. Work Location (City and Address)/Hours of Work</b> Operations Center, 7285 Parson Drive, Dimondale, MI Monday - Friday 8:00 am to 5:00 pm

**14. General Summary of Function/Purpose of Position**

This position serves to improve the quality of Treasury's customer interactions through monitoring and evaluating incoming and outbound telephone calls and correspondence handled by Treasury Customer Service Representatives (TCSRs) and tax returns processed by Calculations Assistants in the Tax Processing Bureau. Evaluations are completed in the NICE system, which is also used to randomly record calls. Quality Assurance Technicians assist in coaching staff in the tax division to improve performance and productivity. The position also recommends changes to current processes and procedures identified through quality assurance reviews. Must demonstrate in-depth knowledge of at least one business tax (Corporate Income Tax, Sales, Use and Withholding Taxes and Business Registration), and a thorough understanding of Treasury Department policies, procedures, systems and their applications.

**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: 75**

Randomly sample and review staff interactions with customers (phone and correspondence) and processed returns for quality of work. Monitor samples of tax returns processed to recommend changes to procedures, policies and training to improve overall quality. Evaluate returns processed and written outbound letters and responses based on existing quality standards documentation, providing coaching to team members that improves and maintains performance.

**Individual tasks related to the duty:**

- Monitor and evaluate recorded calls for compliance with established performance standards.
- Evaluate written responses to customer account inquiries based on established performance standards
- Assist in providing coaching that results in improved performance and efficient utilization of tools and Treasury systems.
- Identify training needs; assist in the development of training materials and training programs as needed.
- Participate in calibration sessions to ensure inter-rater reliability.
- Recommend changes in processes and procedures that facilitate overall improvement in customer interactions.

**Duty 2**

**General Summary:**

**Percentage: 10**

Serve as a technical resource for team members and others. Process requests for resolution of customer issues that are technical or complex such as allocation, apportionment, Nexus and other issues. Demonstrates knowledge of research procedures for explanation of tax law and procedures and policies.

**Individual tasks related to the duty:**

- Use available reference materials to find answers to questions (West Tax Guides, memorandums, tax instruction booklets, procedure manuals, etc.).
- Serves as a technical resource for staff being evaluated.
- Provide guidance to team members with unusual or complex inquiries.
- Independent judgment is used to escalate issues to senior management, training and to provide answers to questions from staff.

**Duty 3**

**General Summary:**

**Percentage: 10**

Other related duties as assigned, including acting as a project leader or project team member for projects established by management.

**Individual tasks related to the duty:**

- Miscellaneous office duties as assigned.
- Assist in the development of parameters and procedures for completing special projects.
- Assist in the development of standard letters and paragraphs.
- Provide expertise to other divisions in the Department.
- Assist Income Tax Processing analysts and other division staff in developing training materials and job aids.
- Assist supervisors in coaching team members to improve quality.

**Duty 4**

**General Summary:**

**Percentage: 5**

Compiles, reviews and monitors NICE reports for assigned tax units.

**Individual tasks related to the duty:**

- Run queries and reports related to individual and group performance.
- Compile periodic reports and distribute to managers and supervisors.
- Review adherence to quality performance levels for those being evaluated and report to QA and Business Division managers and supervisors as needed for performance improvement.

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

Evaluation and coaching of staff for improved quality. Recognition of team member's superior performance. Recommending changes to procedures and training that enhance the quality of work. Serving as a technical resource for staff.

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

Disclosure of information in unusual situations.

Coaching related to performance issues potentially identified as disciplinary in nature.

Analysis of new policies as they impact the operation of the Business Tax Division.

**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.**

This individual must work at a desk for long periods of time. The job requires extensive use of a personal computer, consisting of repetitive motions used in keyboarding and information retrieval. The individual will present information in small group settings and may facilitate discussions in small to medium sized groups.

**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?**

This position serves to improve the quality of Treasury's customer interactions through monitoring and evaluating incoming and outbound telephone calls and correspondence handled by Treasury Customer Service Representatives (TCSRs) and tax returns processed by Calculations Assistants in the Tax Processing Bureau. Evaluations are completed in the NICE system, which is also used to randomly record calls. Quality Assurance Technicians assist in coaching staff in the tax division to improve performance and productivity. The position also recommends changes to current processes and procedures identified through quality assurance reviews. Must demonstrate in-depth knowledge of at least one business tax (Corporate Income Tax, Sales, Use and Withholding Taxes and Business Registration), and a thorough understanding of Treasury Department policies, procedures, systems and their applications.

**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 Quality Assurance Unit is responsible for the development of performance standards (expected behaviors) and the measurement of compliance with those standards in several channels of customer interaction (calls, correspondence, returns). The unit is responsible for the identification of training needs, completion of special assignments and the execution of projects designed to improve the efficiency and effective ness of operations. This position ensures the quality of the work completed in the Tax Processing Bureau.

**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 7**

One year of experience performing administrative support activities equivalent to the 7-level in state service.

**Departmental Technician 8**

One year of experience performing administrative support activities equivalent to the 8-level in state service.

OR  
One year of experience as a technician or paraprofessional equivalent to the entry level in state service.

**Departmental Technician E9**

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

OR

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

OR

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

**KNOWLEDGE, SKILLS, AND ABILITIES:**

The employee must be able to effectively communicate with others, coach others for improved performance and analyze situations dealing with tax related matters and resolve them. The employee must have a thorough knowledge of the applicable legislation/statutes as well as the procedures and policies of the Department and resource materials available and the ability to effectively utilize software such as SIEBEL/CRM, FileNet, MARCS, Treasury legacy tax systems, NICE and others.

**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