

**State of Michigan
Civil Service Commission**

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

Position Code

1. DEPTALTE

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) Executive Operations
4. Civil Service Position Code Description Departmental Analyst-E	10. Division Office of Communications
5. Working Title (What the agency calls the position) Business Taxes E-file	11. Section
6. Name and Position Code Description of Direct Supervisor VELLANTI, HEATHER L; DEPARTMENTAL MANAGER-3	12. Unit Forms, Documentation and E-File Services
7. Name and Position Code Description of Second Level Supervisor BIRCHMEIER, DARRON M; STATE ADMINISTRATIVE MANAGER-1	13. Work Location (City and Address)/Hours of Work Operations Center, 7285 Parsons Drive, Dimondale, MI 48821 / Mon-Fri 8:00 a.m. - 5:00 p.m.

14. General Summary of Function/Purpose of Position

The position serves as the e-file analyst for Business Taxes (Corporate Income, City Corporate Income, Michigan Business and Essential Services Assessment). Business Tax data, filed by electronic means, is received, stored and viewed in the Department's tax processing system. The position has primary responsibility for working with private companies that develop software to transmit Business Tax data to the Michigan Department of Treasury. Primary functions for the position include: 1) developing e-file specifications and xml schemas, 2) drafting e-file forms, publications and procedures, 3) being responsible for e-file test and production systems 4) coordinating test package development and testing with developers, Department of Technology, Management and Budget (DTMB) and Treasury staff; and 5) developing written guidelines for software developers and tax preparers.

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: 45

As the Business Tax e-file analyst, evaluates existing e-file processes, conducts research and recommends changes internally and for software developers based on the evaluation, research and knowledge of the e-file processes for both test and production systems. Oversees testing of changes and assist in the implementation of new processes and works with systems staff from DTMB and software developers to identify and resolve problems.

Individual tasks related to the duty:

- Participates in core group for new Business Taxes e-file system(s).
- Uses Business Tax e-file programs knowledge in assisting DTMB, Tax Administration and IT Business Integration Division in resolving production issues.
- Identifies changes necessary to accommodate IRS e-file schema updates related to the IRS 1120 and 1065 e-file programs, e-file specifications changes, Federal Tax Administrator (FTA) E-Standards, legislation, or changes in Departmental policy.
- Conducts in-depth research and analysis, including software developer testing and production data received electronically from software developers' programs.
- Analyzes e-file Business Tax programs as requested by Treasury's Executive Office, Tax Administration Services Bureau or Tax Compliance Bureau.
- Conducts research and reports out results including recommending changes for Treasury's and for software developers' existing or new processes to improve operational effectiveness and efficiency.
- Works with software developers and DTMB analysts to identify, develop, evaluate and test new and existing e-file Business Tax processes. Serve as a liaison with DTMB for Business Tax e-file processes.
- Serve as representative for Michigan's Business Taxes e-file Fed/State Modernized e-File (MeF) programs for outside organizations such as FTA, IRS, and tax practitioners.

Duty 2

General Summary:

Percentage: 35

As the Business Tax e-file analyst, develops and maintains XML schema packages, written software developer specifications, testing publications, software developer guides, Tax Preparer Handbooks, and procedures and forms based on knowledge of e-file for Business Tax processes. Researches and evaluates existing e-file processes or the implementation of new e-file processes for Business Taxes. Serves as a representative of e-file for Business Tax processes for Treasury's Business Taxes forms teams

Individual tasks related to the duty:

- Schema development – designs and creates XML schema packages for e-file Business Taxes.
- Conducts annual vetting of new and existing software developers for participation in Business Tax e-file programs.
- Drafts, updates and reviews publications, guidelines and forms based on knowledge of Business Tax e-file processes and interpretation of national standards set by IRS, E-Standards, and legislative changes.
- Recommends changes to or creation of job procedures and charts to reflect changes due to e-file specification changes, schema changes, legislation or modifications to work methods.
- Collects, consolidates, and analyzes comments, conducts research and recommends changes to incorporate changes in the Division's e-file Business Tax forms and/or publications. Reviews and determines the need to purge procedures, guidelines, and forms.
- Answers inquiries related to the Division's e-file Business Tax procedures and forms from Treasury staff, software developers, tax preparers and the general public through oral and written communications.
- Drafts, updates and reviews internal and external forms including software developer e-file test packages, software developer publications, Tax Preparer e-file Handbooks and related e-file publications.

Duty 3

General Summary:

Percentage: 15

Special projects as assigned, including participation as the e-file representative working with DTMB for Business Tax e-file program.

Individual tasks related to the duty:

- Evaluates e-file applications working with DTMB/Contractor(s) for potential implementation into Business Tax programs/systems.
- Conducts research and analysis related to processes or programs and prepares written communications related to the analysis. The written communications may include forms, memos, letters or reports.
- Conducts surveys or special studies to assist in evaluating or implementing programs.
- Develops information related to e-file Business Tax programs for posting on Treasury's Web site.
- Ensures Treasury's Business Tax E-file Web site is updated with the latest information utilized by taxpayers and software developers.
- Participates in a working group established to develop a new processing system for the replacement of the current Business Tax e-file program.

Duty 4

General Summary:

Percentage: 5

Develops, oversees and conducts training related to e-file of Business Taxes for the Department of Treasury.

Individual tasks related to the duty:

- Researches, collects and analyzes program data to determine e-file training needs.
- Develops training materials for e-file Business Tax programs based on evaluation of the training needs of staff and requests from various bureaus.
- Develop and conduct training sessions.

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

Decisions related to acceptance of software developer testing. Decisions on areas that will be researched and what analysis is required to identify problems with or changes to the e-file Business Tax processes. Decisions related to the content and format of e-file specifications and documentation.

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

Decisions that affect the policies and procedures of the Section, Office and/or the Department. Implementation of changes identified as a result of research and analysis conducted as Office's recognized resource person. Decisions related to unusual situations that do not have guidelines for the correct procedure to use. Decisions that require additional funding.

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. Handling multiple duties in a fast-paced environment, especially during peak period. This job requires extensive use of a personal computer. Out-State travel to attend workshops and seminars.

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 position's primary functions include: 1) analyzing data to provide recommendations for both test and production e-file systems, 2) coordinating software developer testing, including development of software developer testing materials, 3) developing and maintaining software developer e-file specification and publications, 4) drafting e-file forms and instructions 5) developing training materials and conducting training sessions and, 6) developing written guidelines.

The position's essential duties are to serve as Treasury's Business Tax e-file analyst verifying need for program changes and developing forms and guidelines. To coordinate with DTMB/Contractor(s) on necessary program changes and identify and develop e-file training for Business Taxes as needed.

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

Downgrading position from a recognized resource to and E-level analyst. Mote complex duties being removed.

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

The function of the work area is to develop and maintain Forms, Documentation and E-File Services FDES e-file programs for the Business Taxes Division and to support the return processing function. This position performs analytical duties of forms and procedures development, and project development related to the Business Tax e-file processes.

The Tax Administration Services Bureau processes over 70,000 Business Tax returns annually. Over 56,000 Business Tax returns are filed through the IRS 1120 and 1065 e-file programs, resulting in significant savings to the Department and the citizens of Michigan.

The E-file unit of FDES is responsible for developing and implementing new technologies to increase data capture and improve tax return processing for Individual Income Tax returns, Fiduciary Income Tax returns, Corporate Income Tax returns, Michigan Business Tax returns, and Sales, Use and Withholding tax returns and City of Detroit tax returns. These technologies include electronic filing of tax returns; filing of tax returns through IRS MeF System, Michigan Treasury Online and SUW Bulk Web Service, which consists of all of the information contained in the tax return; and image-assisted data entry of tax return data

This position serves as the e-file analyst who implements and tests new technologies and enhancements to existing e-file Business Tax programs. Functions of this position are to perform analytical duties in the development of e-file Business Tax procedures, software developer testing materials and publications, software developer file specifications and XML schemas, training materials, forms, and guidelines. Functions also exist to provide training, develop forms, guidelines and procedures related to the e-file processes.

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 Analyst 9

No specific type or amount is required.

Departmental Analyst 10

One year of professional experience.

Departmental Analyst P11

Two years of professional experience, including one year of experience equivalent to the intermediate (10) level in state service.

Alternate Education and Experience**Departmental Analyst 9 - 12**

Educational level typically acquired through completion of high school and the equivalent of at least two years of full-time active-duty experience at or above the E-6 level in the uniformed services may be substituted for the education requirement.

KNOWLEDGE, SKILLS, AND ABILITIES:

The individual should possess the following abilities: the ability to analyze and evaluate a variety of data from the standpoint of systems and procedures; the ability to organize, evaluate and present information effectively; the ability to design forms; the ability to communicate effectively with others; the ability to learn and utilize computer processes. Additionally, the individual should also have the ability to interpret laws, rules and regulations related to their work. Strong interpersonal, stress management, decision making and multi-tasking skills along with working knowledge of Business Tax processing is desirable.

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.

SONYA CARTER

8/7/2025

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