

**State of Michigan
Civil Service Commission**

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

Position Code

1. DEPTSPV3B66N

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 SUPERVISOR-3	10. Division Business Taxpayer Services Division
5. Working Title (What the agency calls the position) Departmental Supervisor 12	11. Section
6. Name and Position Code Description of Direct Supervisor BUDD, JASON; DEPARTMENTAL MANAGER	12. Unit
7. Name and Position Code Description of Second Level Supervisor ASHER, ANDREA; STATE ADMINISTRATIVE MANAGER	13. Work Location (City and Address)/Hours of Work Operations Center, Dimondale, MI Monday-Friday 8:00am to 5:00pm

14. General Summary of Function/Purpose of Position

The purpose of this position is the coordination and oversight of all unit functions in a complex work area, which must be carried out in order to meet Division and Department goals and objectives.

Functions include all second-line supervisor duties, including setting priorities, and directing the work of full-time, permanent employees. Additional functions include identifying processing problems, informing administration of problems with processing methods or potential difficulties in meeting deadlines, assisting with development of training with support staff, and managing backlogs and metrics to ensure timely and accurate processing of returns, correspondence and customer phone calls. Also included are ensuring accurate, consistent tax information is released to the public. Provide customer feedback on potential process improvements to others in the organization and continually improve content.

Serve as liaison with other departments and divisions. This individual must understand the functions of systems used by the section, be able to recognize and describe system functional flaws and opportunities for improvement, and know the organizational procedures required to initiate system corrections and improvements.

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: 30

Manage backlogs and metrics to ensure timely and accurate processing of returns, correspondence and customer phone calls. Conduct research and make recommendations to management team for improvement opportunities in forms, instructions, web content, work processes and systems. Coordinate efforts and co-lead meetings with other areas within and outside the bureau to ensure that customer communication opportunities are being met in the most efficient method possible.

Individual tasks related to the duty:

- Conduct research and make recommendations to upper management for customer service opportunities and improvement opportunities in forms, instructions, Web content, work processes and systems.
- Manage backlogs and metrics to ensure timely and accurate processing of returns, correspondence and customer phone calls.
- Develop strategies to manage backlogs in order to meet the Department's goals for the timely processing backlog items.
- Coordinates efforts and co-leads meetings with other areas within and outside the Bureau to ensure customer communication opportunities are being met in the most efficient method possible. Review work assignments, problems and customer communications and service opportunities as identified by first-line supervisors.

Duty 2

General Summary:

Percentage: 20

Ensure the Department's quality assurance goals are met.

Individual tasks related to the duty:

- Attend meetings with quality assurance staff to ensure quality standards are met.
- Responsible for conducting research and making recommendations to upper management for improving customer service opportunities and work processes. Responsible for approving all performance metrics related to process flows.
- Develop criteria and modifications for evaluating calls correspondence processing and returns.
- Direct Supervisors in the proper procedures for evaluating, monitoring and coaching call center agents using call center software to ensure accurate, confidential and courteous responses are being conveyed to customers.
- Evaluate and verify employee performance and ensure quality assurance standards established by the department are met.
- Develop additional quality standards with quality assurance staff.
- Identify staff development and training needs and ensure that training is obtained.
- Responsible for identifying causes and making recommendations to administration for changes when performance metrics do not meet benchmark metrics.

Duty 3

General Summary:

Percentage: 20

Manage, through first-line supervisors and technicians, review of the procedures and processes used in reviewing returns and the evaluation of files. Responsible for identifying causes for excessive backlogs or sub-complex quality and making recommendations to administration for changes.

Individual tasks related to the duty:

- Resolve escalated matters and escalate relevant concerns to division leadership as needed.
- Identify problems with existing return processing procedures.
- Liaison with analyst, division leadership, state vendors and work with Administrator and State Administrative Manager to ensure procedures for processing tax returns are in compliance with the section's existing procedures and policies.
- Review complex accounts with first-line supervisors and/or departmental technicians.
- Provide written and oral instruction to section staff and review written instructions for any other division's staff that are processing tax returns (e.g., Discovery).
- Review and approve procedures, job aids, and job outlines.
- Monitor the status of production through review of information contained in backlog, production, and quality reports. Administration is advised if projected deadlines or quality standards are not being met and recommendations are made for changes to procedures and guidelines that will increase production, improve quality, and/or reduce backlogs.
- Establish procedures, charts and job outlines that are the responsibility of the work area.
- Review work assignments, answer questions and identify problems in procedures and processes.

Duty 4

General Summary:

Percentage: 15

Serve as a key member of a team, including analysts, other assigned staff, and State and vendor system support staff, that understand the functions of systems used by staff. Responsible for identifying system problems that are causing incorrect refunds, liabilities, or correspondence to the taxpayer and accepting review of system test results, along with analysts and other assigned staff.

Individual tasks related to the duty:

- Provide input as to the system needs for processing business tax returns.
- Verify that the return processing systems operate correctly.
- Monitor the numerous criteria by which returns are selected for manual review and identify related problems with the system.
- Review system test results, along with analysts and other assigned staff.
- Understand the functions of systems used by section staff, be able to recognize and describe system functional flaws and opportunities for improvement, and know the organizational procedures required to initiate system corrections and improvements.

Duty 5

General Summary:

Percentage: 10

Monitor interpretations of statutes, rules, regulations, policies and procedures. Inquiries may originate with taxpayers, practitioners, attorneys, other Departments, Treasurer's Office, and Departmental staff. Act as resource liaison for legislative inquiries and responds to written requests, on behalf of administration. Responsible for performing special projects and other duties as assigned.

Individual tasks related to the duty:

- Act as a liaison with leadership from other Departments and Divisions with the purpose of presenting information regarding problems and proposed solutions. Also ensure that their practices are in compliance with our established policies and guidelines.
- Responsible for working, on a timely basis, special requests received from Front Office and Legislative Liaison for accounts requiring particular handling due to political sensitivity. Review complex files, compile data, and prepare documentation to be presented at informal conference hearings.
- Assure staff responses, written and verbal, comply with the Department's policy on disclosure. Assist staff, including first-line supervisors and/or departmental technicians, in dealing with abusive or irate taxpayers or practitioners. Monitoring the activities of supervisors, along with departmental technicians and Customer Service Representative staff, provides this position with information essential to identifying as early as possible, systems problems, as well as anticipating and avoiding other problems and evaluating staff performance.
- Responsible for co-leading meetings between this section and other sections or divisions to review procedures and resolve problems and ensure that work is completed in a manner mutually satisfying for all units involved.
- Serve as a resource person for the section regarding complex tax questions, department procedures for handling taxpayer account inquiries, and interpretation of the many tax laws and makes exceptions to accepted procedures when the situation warrants.

Duty 6**General Summary:****Percentage: 5**

Select and assign staff, as well as evaluate and verify employee performance and accepting review of system test results, along with analyst and other designated staff.

Individual tasks related to the duty:

- Assure 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.
- Review work assignments, problems or questions as identified by first-line supervisors. Conduct staff meetings to ensure staff is aware of overall goals and objectives. Review evaluations made by supervisors in their review of staff work and performance.
- Oversee performance review and performance metrics for CSRs, department technicians, and front-line supervisors. Make recommendations for change to the metrics.
- Conduct staff meetings and present information to staff.

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

Changes procedures and implements changes to existing policies and makes decisions involving staff from other Divisions. These decisions affect staff and taxpayers and the timeliness of refunds, responses to inquiries, and assessments. They also affect the education of tax preparers, financial institutions, legislative staff, and individual taxpayers.

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

If the employee suspected a staff member of violating internal control procedures in an attempt to defraud the state, the next level of supervision would be immediately informed and a course of action determined. If employee morale was being negatively impacted due to a policy or procedure, would consult with State Administrative Manager or Administrator.

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.

Physical effort and environmental conditions are similar to those in a normal business office operation. These include sitting and utilizing a personal computer for long periods of time, and stress.

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>
	OFFICE SUPERVISOR-2 10		OFFICE SUPERVISOR-2 10
	OFFICE SUPERVISOR-2		OFFICE SUPERVISOR-2 10
	OFFICE SUPERVISOR-2 10		OFFICE SUPERVISOR-2 10

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?

Leadership and guidance for the first-line supervisors, and for development and continuous improvement of work processes. Input on problems and potential opportunities for improvement of the numerous systems used by the work area. Liaison with numerous partner units throughout state government.

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 function of the work area is the examination, correction or disallowance of all questionable or erroneous returns. Certification of the propriety of transactions; analysis of information from other sources; initiation, evaluation or adjustment of assessments for tax, penalty and interest; detection of fraudulent returns and forwarding of such to the appropriate party for further investigation. Communication of interpretations and applications of statutes, policies, rules, etc., to staff, taxpayers, practitioners, as well as representatives of other divisions and departments. This position provides leadership, guidance, and technical expertise.

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 Supervisor 12

One year of experience equivalent to a Departmental Supervisor 11 or experienced-level professional; or two years equivalent to a Departmental Supervisor 10, Office Supervisor 11 and 12, Secretary Supervisor 11, experienced-level technician or paraprofessional; or three years equivalent to an Office Supervisor 10, Secretary Supervisor 10, Emergency Dispatch Supervisor 10, or Human Resources Customer Service Supervisor 10.

KNOWLEDGE, SKILLS, AND ABILITIES:

The employee must be self-motivated, possess leadership abilities, be team orientated and possess analytical and problem solving skills. The employee should also have a thorough understanding of the techniques needed for effective delegation of authority and responsibility.

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