

## 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> Legislative Affairs
<b>4. Civil Service Position Code Description</b> Departmental Technician-E	<b>10. Division</b> Office of Advocacy Services
<b>5. Working Title (What the agency calls the position)</b> Offer In Compromise Technician	<b>11. Section</b> Offer in Compromise Section
<b>6. Name and Position Code Description of Direct Supervisor</b> MILLER, REBECCA J; DEPARTMENTAL MANAGER-3	<b>12. Unit</b>
<b>7. Name and Position Code Description of Second Level Supervisor</b> NORTON, ROBIN; STATE ADMINISTRATIVE MANAGER-2	<b>13. Work Location (City and Address)/Hours of Work</b> Dimondale, MI / 8:00 -5:00
<b>14. General Summary of Function/Purpose of Position</b> The Offer in Compromise (OIC) program was established under Public Act 240 of 2014 and amended the Michigan Revenue Act. An OIC is a request by a taxpayer for Treasury to compromise an assessed tax liability for less than the full amount. This position performs a variety of technical assistant functions in support of the Offer in Compromise Section. The position monitors and organizes all incoming and existing OIC requests submitted by individual and business taxpayers; receives, reviews, and responds to inquiries from internal and external stakeholders; and prepares documentation utilized in the decision-making process for OICs appealed for Independent Administrative Review. This position is also responsible for creating and compiling reports and analyzing statistical data associated with all components of the OIC program.	

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: 60**

Review and track Offer in Compromise (OIC) requests and determine eligibility at intake in accordance with statutory mandates, rules, and departmental policies.

**Individual tasks related to the duty:**

- Review all OIC submissions for initial program eligibility. Notify taxpayers in writing of all eligible, ineligible determinations or additional information needed related to Federal OIC reviews.
- Examine OIC recommendations and maintain electronic files to be utilized in OIC decisions that are appealed for Independent Administrative.
- Research and analyze information to develop and maintain digital tools for tracking OICs.
- Researches, coordinates, organizes and works with Division/Offices throughout the agency on complex OIC requests
- Communicate verbally and in writing with the taxpayer or designated representative.
- Research account errors to determine origin of problem.
- Compose complex, non-standard correspondence related to intake process for manager approval and signature.
- Perform problem resolution of accounts through verbal and written communication with other divisions and bureaus within Treasury as well as the private collection contractor.
- Document and follow up on actions assigned related to upper management.

**Duty 2****General Summary:****Percentage: 15**

Create, update and maintain multiple statistical reports utilizing various programs and media formats.

**Individual tasks related to the duty:**

- Prepare backlog, production, and quality assurance reports related to job duties
- Maintain quality assurance logs and distribute when necessary
- Compile and analyze statistical data
- Recognize inefficiencies and make recommendations for process improvement.
- Create and maintain statistical reports utilized to track various types of assessments, tax types, payments, payment trends, and accuracy of actions.
- Create/recommend standards of assessments and methods to measure for quality assurance.

**Duty 3****General Summary:****Percentage: 15**

Review Offer in Compromise (OIC) non-standard documentation (e.g. personal information, correspondence, legal documents and tax documents) to determine appropriate action on accounts following an Offer in Compromise. Review and monitor accounts after acceptance, rejection, or ineligibility.

**Individual tasks related to the duty:**

- Review non-standard documentation from various sources.
- Research various sources of Treasury documentation to make determination.
- Determine appropriate action on account after non-standard document review.
- Recommend/implement corrective action taken on assessments or the assessment process.
- Compose complex, non-standard correspondence related to action on accounts following determination for manager approval and signature
- Research account errors to determine origin of problem
- Compose correspondence related to Offer in Compromise process for manager approval
- Request refunds as needed
- Perform problem resolution of accounts through verbal and written communication with staff from the Department of Attorney General, other divisions and bureaus within Treasury, as well as, the private collection contractor.
- Timely update multiple Treasury systems with outcomes and action taken.
- Monitor and track OIC payments made after OIC acceptance. Confirm taxpayer compliance with terms of acceptance and monitor for revocation of OIC if taxpayer is not in compliance.
- Monitor and track rejected OIC's for receipt of Independent Review Requests from the Office of Legal Affairs.

**Duty 4****General Summary:****Percentage: 10**

Other duties as assigned.

**Individual tasks related to the duty:**

- Participate on special projects.
- Participate on continuous improvement teams.
- Participate in meetings, trainings, and other department related activities.
- Any other duties as assigned.

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

Decisions related to appropriate disclosure within Treasury guidelines. Decisions related to individuals or businesses selected for assessment within prescribed Treasury guidelines. Decisions are made regarding the approval or recommendation of action on an account based on research and evaluation of data from various sources. Decisions are made daily using independent judgment and expertise when evaluating data and responding to internal and external customers.

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

More complex decisions related to non-standard documentation associated with disclosure, accuracy of issuance, correction of accounts and approvals.

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.

Regularly sitting or standing at a computer for long periods of time doing repetitive motions. Occasional stress due to short deadlines. Requires the ability to communicate verbally over the telephone or video chat with taxpayers or appropriate taxpayer representatives. This position sometimes requires contact with belligerent, highly emotional and sometimes hostile taxpayers.

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?

Review, monitor and organize all OIC related documentation received by individual and business taxpayers, process internal stakeholder's inquiries, prepare documentation for Independent Administrative Reviews and create, compile, and analyze statistical data associated with all components of the OIC program. Each of the duties described in Section 15 are essential functions of this position.

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

New position.

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

The Office of Advocacy Services is responsible for assisting in the resolution of complex taxpayer account problems and all aspects of the OIC program. The office serves as a resource of last resort for taxpayers and tax professionals, focused on helping individuals and businesses who have exhausted Treasury's normal channels of resolution. This position is responsible for the overall monitoring and coordinating of OIC documentation, communication, and statistical reporting.

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

EDUCATION:

High School Diploma or GED certificate.

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:**

- Ability to communicate effectively through both written and verbal communication.
- Ability to maintain favorable public relations.
- Ability to operate general office equipment, laptop and desktop computer.
- Ability to interpret and apply complex laws, rules and regulations related to the work area.
- Ability to analyze data and operations and make recommendations for change.
- Ability to abstract and present significant facts from data researched.
- Knowledge of rules, regulations, policies, procedures, precedents and terminology used in the work area

**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

5/4/2022

\_\_\_\_\_  
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.***

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Employee

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Date