

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

Position Code 1. DPTLTCHAJ97R

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) Collection Services Bureau
4. Civil Service Position Code Description Departmental Technician-A	10. Division Services Management
5. Working Title (What the agency calls the position) Senior Worker	11. Section Legal
6. Name and Position Code Description of Direct Supervisor SECREST, MATTHEW; DEPARTMENTAL SUPERVISOR	12. Unit Legal
7. Name and Position Code Description of Second Level Supervisor DIETERLY, WILLIAM; DEPARTMENTAL MANAGER 3	13. Work Location (City and Address)/Hours of Work Operations Center, Dimondale, MI / M-F 8:00a – 5:00p

14. General Summary of Function/Purpose of Position

This position performs complex legal functions for the Collection Services Bureau (CSB). As the Senior Worker, this position functions independently while handling difficult and complex legal functions for the unit. The difficult and complex legal functions include requests from the Office of Attorney General (AG), both Lansing & Detroit; various litigation matters including bankruptcy settlements; determination of Corporate Officer Liability (COL) and/or Successor; Authorized Representative Declaration (ARD/POA) requests; Freedom of Information Act (FOIA) requests; and other legal related functions.

Additionally, this position will review the daily work assignments of the Legal Technicians to evaluate the productivity and quality of work, schedule tasks to be completed by the Legal Technicians, and assist the manager in identifying problem areas and provide input for developing solutions. This position also assists in the preparation and review of the documentation utilized by Treasury in informal conferences and/or Tax Tribunal for the difficult and complex situations.

This position will train staff as well as maintain and update all training materials regularly. Additionally, this position responds verbally and in writing to telephone and written inquiries, provides support to Legal analysts, tracks and compiles statistical data, and creates and assembles reports associated with the legal functions of the unit.

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: 40

Perform the difficult and complex legal functions. Provide guidance to the Legal Technicians for resolution of legal situations. Review daily work assignments of the Legal Technicians to evaluate the productivity and quality of work. Recommend prioritization of unit tasks and delegation of assignments. Assist management in identifying problem areas and provide input for developing solutions.

Individual tasks related to the duty:

- Prepare and file difficult and complex collection claims including, but not limited to, bankruptcy, probate, receivership, out of state collection cases.
- Resolve complex account issues and discrepancies referred by staff related to AG accounts.
- Resolve complex inquiries regarding claims, judgments, and referrals.
- Interact with the public, Trustee's offices, and the AG's office to resolve accounts paid through and handled by the AG's office.
- Update account status/responsibility to code accounts for reinstatement requests.
- Review daily work assignments of technicians to evaluate the productivity and quality of work.
- Review backlog and production reports to recommend priorities, changes, and training needs.
- Schedule tasks to be completed by the technicians.
- Provide the first line decision making for the Legal Technicians.
- Ensure the Legal Technicians are following the proper sequence of steps of the collection process.
- Ensure policies and procedures are followed and current.
- Proofread documents created by Legal Technicians for accuracy and completeness.
- Respond verbally and in writing to the difficult and complex legal situations.
- Communicate verbally and in writing with other areas within the bureau, other Treasury divisions, AG, private collection agency, taxpayer, bankruptcy trustee, and designated representatives.
- Recommend/implement corrective action of assessment process.

Duty 2

General Summary:

Percentage: 20

Process and review complex requests and applications for corporate officer and successor liability. Prepare and review of documentation utilized by Treasury in informal conferences and/or Tribunal Hearings for the difficult and complex situations. Resolve complex account issues and discrepancies.

Individual tasks related to the duty:

- Research and compile complex legal documentation to support informal conference and tax tribunal cases.
- Review complex requests and applications of corporate officer and successor liability.
- Review and approve complex legal documentation and correspondence regarding corporate officer and successor liability.
- Review and approve complex documentation to be utilized in informal conference and/or tax tribunal cases.
- Communicate verbally and in writing with taxpayers or designated representatives.
- Research complex issues using a variety of resources (tax law, RAB, policy, procedure) and prepare responses.
- Research complex account errors to determine origin of problem and communicate problem resolution to the appropriate area.
- Ensure Legal Technicians are following appropriate sequence for next steps of collection process (legal actions, refunds, correct assessments).
- Ensure policies and procedures are followed and current.
- Proofread documents created by Legal Technicians for accuracy and completeness.

Duty 3

General Summary:

Percentage: 10

Create, maintain, and update all training materials and job aids for the legal technicians. Assist with training legal technician staff.

Individual tasks related to the duty:

- Maintain and update all training materials and job aids.
- Assist management to identify training needs of the unit.
- Assist with training current and new employees and act as the *on-the-job* trainer.

Duty 4

General Summary:**Percentage: 10**

Review and process collection account claims and prison debt inquiries. Review and determine property tax foreclosure and related liens and file claims.

Individual tasks related to the duty:

- Review the determination for eligibility of out of state debt.
- Resolve complex inquiries regarding claims out of state debt and prison debt.
- Interact with AG and prison staff concerning the processing of claims for out of state and prison debt inquiries.
- Maintain files for out of state debt and prison debt.
- Review and track property tax foreclosure notices.
- Research accounts to determine lien validity.
- Review the determination for eligibility to file claims in a property tax foreclosure.

Duty 5**General Summary:****Percentage: 10**

Create, compile, and analyze statistical data associated with collection accounts. Prepare production reports. Review and reconcile AG and GC reports. Monitor unit backlog.

Individual tasks related to the duty:

- Compile data for daily, weekly, and monthly reports.
- Monitor unit backlog and make any recommendations for training and/or changes.
- Prepare various production reports.
- Review and reconcile AG quarterly reports.
- Review and reconcile GC monthly reports.

Duty 6**General Summary:****Percentage: 10**

Performs other tasks as assigned.

Individual tasks related to the duty:

- Set up, participate in, or lead meetings.
- Participation on continuous improvement teams.
- Participation in trainings and special projects.
- Provide support to Legal analysts.

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 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 judgement and expertise when evaluating data and responding to internal and external customers. The Senior Worker may also make complex decisions in the absence of the management based upon established guidelines and past practices.

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

Decisions which result in major change for Treasury or Bureau policies, procedures, or practices. Decisions which have a major budgetary impact, like a system change or process change. Decisions where precedent has not been established. Requests for Treasury decision in legal matters. More complex decisions and responses related to non-standard documentation associated with disclosure, accuracy of issuance, correction of accounts, hearing and tribunal response, 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.

Lifting of boxes up to 20 pounds. Extensive PC work. Repetitive motion tasks requiring standing and sitting. Occasional stress due to short due dates. Ability to communicate via telephone with taxpayer or a representative, including contact with occasional highly emotional and sometimes hostile taxpayer.

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 performs complex legal functions for the Collection Services Bureau (CSB). As the Senior Worker, this position functions independently while handling difficult and complex legal functions for the unit. The difficult and complex legal functions include requests from the Office of Attorney General (AG), both Lansing & Detroit; various litigation matters including bankruptcy settlements; determination of Corporate Officer Liability (COL) and/or Successor; Authorized Representative Declaration (ARD/POA) requests; Freedom of Information Act (FOIA) requests; and other legal related functions.

Additionally, this position will review the daily work assignments of the Legal Technicians to evaluate the productivity and quality of work, schedule tasks to be completed by the Legal Technicians, and assist the manager in identifying problem areas and provide input for developing solutions. This position also assists in the preparation and review of the documentation utilized by Treasury in informal conferences and/or Tax Tribunal for the difficult and complex situations.

This position will train staff as well as maintain and update all training materials regularly. Additionally, this position responds verbally and in writing to telephone and written inquiries, provides support to Legal analysts, tracks and compiles statistical data, and creates and assembles reports associated with the legal functions of the unit.

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

New Position. Requesting to establish a new Departmental Tech 10 position based on approved senior standards for selected candidate, Kimberly Merriman (1118511). Ms. Merriman was selected through a regular selection process.

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

The CSB is responsible for the collection of delinquent tax and state agency debts. This position provides technical support for legal functions within CSB including bankruptcy, corporate officer liability, successor liability, various requests – AG, FOIA, Authorized Representative Declaration (ARD/POA) Hearings and Tax Tribunal, legislative and taxpayer inquiries, etc.

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:

Ability to determine work priorities.

Ability to allocate work to other Departmental Technicians and support staff in a work area.

Knowledge of rules, regulations, policies, procedures, precedents, and terminology used in the work.

Knowledge of the techniques of using reference materials and organizing data for reports.

Knowledge of the techniques of interviewing and of obtaining information.

Knowledge of organizations, workflow, staffing, forms, and procedures.

Ability to use a computer is required.

Ability to abstract and present significant facts from data.

Ability to interpret and apply complex laws, rules, and regulations.

Ability to analyze data and operations and make recommendations for change.

Ability to conduct training and information sessions.

Ability to communicate effectively.

Ability to maintain favorable public relations.

**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.

KELLY FOREN

7/20/2023

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