

**State of Michigan  
Civil Service Commission**

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

**Position Code**

1. DEPTTRER45N

**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><br>TREASURY CENTRAL PAYROLL                                                                                              |
| <b>3. Employee Identification Number</b>                                                                                        | <b>9. Bureau (Institution, Board, or Commission)</b><br>EXECUTIVE OPERATIONS                                                                         |
| <b>4. Civil Service Position Code Description</b><br>DEPARTMENTAL ANALYST TRAINEE-E                                             | <b>10. Division</b><br>OFFICE OF COMMUNICATIONS                                                                                                      |
| <b>5. Working Title (What the agency calls the position)</b><br>FIDUCIARY INCOME TAXES E-FILE ANALYST                           | <b>11. Section</b><br>FORMS, DOCUMENTATION & E-FILE                                                                                                  |
| <b>6. Name and Position Code Description of Direct Supervisor</b><br>VELLANTI, HEATHER L; DEPARTMENTAL MANAGER-3                | <b>12. Unit</b><br>E-FILE                                                                                                                            |
| <b>7. Name and Position Code Description of Second Level Supervisor</b><br>BIRCHMEIER, DARRON M; STATE ADMINISTRATIVE MANAGER-1 | <b>13. Work Location (City and Address)/Hours of Work</b><br>OPERATIONS CENTER, 7285 PARSONS DRIVE,<br>DIMONDALE, MI / MONDAY - FRIDAY, 8 AM TO 5 PM |

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

The position serves as an e-file analyst for Fiduciary Income Taxes. Fiduciary Income Tax data, filed by electronic means, is received, stored, and viewed prior to system upload. The position has primary responsibility for working with private tax preparation companies (software developers) that develop software to transmit Fiduciary Income Tax data to the Michigan Department of Treasury (Treasury). Primary functions for the position include: developing schema and e-file specifications; drafting e-file forms, publications and procedures; being responsible for e-file test and production systems; coordinating test package development and testing with developers, Department of Technology, Management and Budget (DTMB), FAST Enterprises (FAST), and Treasury staff; and developing written guidelines for software developers and tax preparers.

This position serves as a backup to the Individual Income Tax analyst.

**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: 55**

As a Fiduciary Income 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 e-file changes and assists 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 groups for new Individual and Fiduciary Income Taxes e-file system(s).
- Uses Fiduciary Income Tax e-file programs knowledge in assisting DTMB, FAST, 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 MeF 1041 e-file program, e-file specifications changes, Federal Tax Administration (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 Fiduciary Income Tax program 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, DTMB analysts, and FAST to identify, develop, evaluate and test new and existing e-file Fiduciary Tax e-file processes. Serves as a liaison with DTMB and FAST for e-file processes.
- Serves as a representative for Michigan's Fiduciary Income Tax e-file program for outside organizations such as FTA, IRS and tax practitioners.
- Serves as a backup for Michigan's Individual Income Tax e-file program, which includes City Individual Income Tax.
- Other tasks appropriate for the classification as requested by section and office management.

**Duty 2**

**General Summary:**

**Percentage: 30**

Develops and maintains written software developer specifications, testing publications, software developer guides, Tax Preparer Handbooks, procedures and forms based on knowledge of e-file for Fiduciary Income Tax processes. Researches and evaluates existing e-file processes or the implementation of new e-file processes for Fiduciary Income Tax. Serves as representative of e-file for Individual and Fiduciary Taxes processes for Treasury's Individual and Fiduciary Income Taxes forms teams.

**Individual tasks related to the duty:**

- Conducts annual vetting of new and existing software developers for participation in Fiduciary Income Tax program.
- Drafts new publications, guidelines and forms based on knowledge of Fiduciary Income 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 Fiduciary Income Tax forms and/or publications. Reviews and determines the need to purge forms.
- Answers inquiries related to the Individual Income Tax Division's e-file Fiduciary Income 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 package, software developer publications, Tax Preparer e-file Handbook and related e-file publications.

**Duty 3**

**General Summary:**

**Percentage: 10**

Special projects as assigned, including participation as the e-file representative working with DTMB and FAST for Fiduciary Income Tax e-file program.

**Individual tasks related to the duty:**

- Evaluates e-file applications working with DTMB and FAST for potential implementation into Fiduciary Income 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 Fiduciary Income Tax program for posting on Treasury's Web site.
- Ensures Treasury's Fiduciary Tax E-file Web site is updated with the latest information utilized by taxpayers and software developers.
- Participates in a workgroup established to develop a new processing system for the replacement of the current Fiduciary Income Tax e-file program.

**Duty 4****General Summary:****Percentage: 5**

Develops, oversees, and conducts training related to e-file of Fiduciary Income Tax for the Tax Administration Services Bureau, Tax Policy, Tax Compliance Bureau and Collections Services Bureau.

**Individual tasks related to the duty:**

- Researches, collects, and analyzes program data to determine e-file training needs.
- Develops training for e-file Fiduciary Income Tax program based on evaluation of the training needs of staff and requests from various bureaus.

**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 Fiduciary Income Tax e-file processes. Decisions related to the content and format of Fiduciary Income Tax 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 which 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. Stress involved in managing multiple duties, especially during peak periods. 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 specifications and publications, 4) drafting e-file forms and instructions 5) developing training materials and conducting training sessions, and, 6) developing written guidelines and procedures.

The position's essential duties are to serve as Treasury's Fiduciary Income Tax e-file analyst identifying need for program changes, and developing forms, guidelines and procedures. Position coordinates with DTMB and FAST on necessary program changes and identify and develop e-file training for Fiduciary Income Tax as needed.

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

Updating PD to reflect the JELF processing system has been replaced with a system from FAST Enterprises.

**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 Income Taxes Division and to support the return processing function for Fiduciary Income Tax. This position performs analytical duties of forms and procedures development, and project development related to the Fiduciary Income Tax e-file process.

The Tax Administration Services Bureau processes over 70,000 Fiduciary Income Tax returns annually. Over 45,000 Fiduciary Income Tax returns are filed through the IRS 1041 MeF e-file program: 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 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 Fiduciary Income Tax program. Functions of this position are to perform analytical duties in the development of e-file Fiduciary Income 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 or related business experience. 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.

#### Departmental Analyst 12

Three years of professional experience, including one year of experience equivalent to the experienced (P11) 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.

#### Departmental Analyst (Departmental Trainee) 9

Educational level typically acquired through completion of high school.

Experience-

Four years of experience as an advanced 9-level worker in an ECP Group One classification. OR

Three years of experience as an E9, E10, or E11-level worker in an ECP Group One classification. OR

Two years of experience as an experienced level worker in an ECP Group One technician or paraprofessional classification. OR

Two years of experience as a first-line supervisor in an ECP Group Three classification. OR

One year of experience as a second-line supervisor in an ECP Group Three classification.

#### **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. Good interpersonal skills and knowledge of e-file for Fiduciary and Individual Income Taxes is desirable.

#### **CERTIFICATES, LICENSES, REGISTRATIONS:**

This position has a FTINPRINT sub-class code. The sub-class code indicates 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.

N/A

***I certify that the entries on these pages are accurate and complete.***

SONYA CARTER

7/28/2026

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