

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

Federal privacy laws and/or state confidentiality requirements protect a portion of this information.

**POSITION DESCRIPTION**

This form is to be completed by the person that occupies the position being described and reviewed by the supervisor and appointing authority to ensure its accuracy. It is important that each of the parties sign and date the form. If the position is vacant, the supervisor and appointing authority should complete the form.

This form will serve as the official classification document of record for this position. Please take the time to complete this form as accurately as you can since the information in this form is used to determine the proper classification of the position. **THE SUPERVISOR AND/OR APPOINTING AUTHORITY SHOULD COMPLETE THIS PAGE.**

|   |   |
|---|---|
| <b>2. Employee's Name (Last, First, M.I.)</b><br>Vacant   | <b>8. Department/Agency</b><br>Michigan State Housing Development Authority (MSHDA)                                   |
| <b>3. Employee Identification Number</b>  | <b>9. Bureau (Institution, Board, or Commission)</b>  |
| <b>4. Civil Service Classification of Position</b><br>Accounting Assistant 5 – E7   | <b>10. Division</b><br>Office of Finance  |
| <b>5. Working Title of Position (What the agency titles the position)</b><br>Accounting Assistant   | <b>11. Section</b><br>Mortgage Servicing  |
| <b>6. Name and Classification of Direct Supervisor</b><br>Mary Jo Platte<br>Accountant Manager 13   | <b>12. Unit</b><br>Single Family Mortgage Servicing   |
| <b>7. Name and Classification of Next Higher Level Supervisor</b><br>Teena Briggs<br>Auditor Manager 15   | <b>13. Work Location (City and Address)/Hours of Work</b><br>735 E. Michigan Avenue, Lansing, MI<br>8:00 to 5:00 p.m. |
| <b>14. General Summary of Function/Purpose of Position</b><br><br>To assist the Single Family Mortgage Servicing (SFMS) staff in carrying out the essential responsibilities of servicing MSHDA's single family mortgage loan portfolio. The responsibilities of the SFMS Unit include, but are not limited to, preparing discharge of mortgages, reconciling monthly mortgage activity, monitoring delinquent loans and REO/foreclosure processing. MSDHA has a single family loan portfolio in excess of \$3 billion. |   |

**15. Please describe your assigned duties, percent of time spent performing each duty, and explain what is done to complete each duty.**

**List your duties in the order of importance, from most important to least important. The total percentage of all duties performed must equal 100 percent.**

Duty 1

General Summary of Duty 1

% of Time 35

Prepare Discharge of Mortgages

**Individual tasks related to the duty.**

- Print Schedule K (payoffs) daily.
- Pull files from basement
- Scan documents
- Create discharge and send for recording to appropriate county
- Enter recording information into AOD

Duty 2

General Summary of Duty 2

% of Time 25

Assist in reconciling the monthly mortgage activity.

**Individual tasks related to the duty.**

- Prepare various spreadsheets to facilitate the completion of the monthly reconciliation process.
- Investigate remittance discrepancies.
- Perform data entry for billings.
- Process Name Change requests.
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Duty 3

**General Summary of Duty 3**

**% of Time 25**

Assist in the REO, foreclosure and loss mitigation processes.

**Individual tasks related to the duty.**

- Input and update the mortgage servicing system with applicable dates such as the sheriff sale and redemption expiration.
- Record foreclosure expenses to mortgagors' accounts in the mortgage servicing system.
- Prepare and update various foreclosure spreadsheets.
- File documents.
- Respond to imaging requests from sub-servicer.
- Other duties as assigned

Duty 4

**General Summary of Duty 4**

**% of Time 10**

Assist in monitoring delinquent loans.

**Individual tasks related to the duty.**

- Input bankruptcy dates and delinquency related dates into the system.
- Retrieve foreclosure related documents and submit to the sub-servicer.
- Contact the sub-servicer regarding missing or incomplete monthly reports.
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Duty 5

**General Summary of Duty 5**                      % of Time 5\_\_\_\_\_

Other duties as assigned.

**Individual tasks related to the duty.**

- Assist with special projects as needed.
- Assist with year end audit requests.

Duty 6

**General Summary of Duty 6**                      % of Time \_\_\_\_\_

**Individual tasks related to the duty.**

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- 16. Describe the types of decisions you make independently in your position and tell who and/or what is affected by those decisions. Use additional sheets, if necessary.**

Administrative support type decision.

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

When an assignment is unclear or when existing policies or procedures do not appear to apply to the assigned task.

- 18. What kind of physical effort do you use in your position? What environmental conditions are you physically exposed to in your position? Indicate the amount of time and intensity of each activity and condition. Refer to instructions on page 2.**

Typical office environment.

- 19. List the names and classification titles of classified employees whom you immediately supervise or oversee on a full-time, on-going basis. (If more than 10, list only classification titles and the number of employees in each classification.)**

| <u>NAME</u> | <u>CLASS TITLE</u> | <u>NAME</u> | <u>CLASS TITLE</u> |
|-------------|--------------------|-------------|--------------------|
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20. My responsibility 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.      |

21. *I certify that the above answers are my own and are accurate and complete.*

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 Signature

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 Date

**NOTE: Make a copy of this form for your records.**

**TO BE COMPLETED BY DIRECT SUPERVISOR**

22. Do you agree with the responses from the employee for Items 1 through 20? If not, which items do you disagree with and why?  
New position.

23. What are the essential duties of this position?

To assist the Single Family Mortgage Servicing Staff in carrying-out the essential responsibilities of servicing MSDHA's loan portfolio.

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

N/A

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

MSHDA sells tax-exempt mortgage revenue bonds to the general public. The proceeds of these bonds are used to make first mortgage loans to borrowers that meet certain income and purchase-price restrictions. The mortgage payments received from these mortgagors are used to pay the required payments prescribed in the bond agreements. In order to adhere to the requirements of the bond agreements it is imperative that the financial transactions associated with each bond series are properly administered and accounted for in MSHDA's accounting system.

This position will assist the unit in meeting the accounting requirements contained in the applicable bond agreements.

**26. In your opinion, what are the minimum education and experience qualifications needed to perform the essential functions of this position.**

**EDUCATION:**

Education level typically acquired through completion of high school.

**EXPERIENCE:**

Accounting Assistant 5 – No specific type or amount is required.

Accounting Assistant 6 – One year of administrative support experience.

Accounting Assistant E7 – Two years of administrative support experience, including one year equivalent to an Accounting Assistant 6, involving posting financial data to ledgers, preparing invoices, billings and/or vouchers, reviewing and coding financial information, and maintaining account balances.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

Strong organizational, financial/accounting and analytical skills are highly desirable. Proficiency with WORD and Excel are strongly preferred.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

*NOTE: Civil Service approval of this position does not constitute agreement with or acceptance of the desirable qualifications for this position.*

**27. 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's Signature

\_\_\_\_\_  
Date

**TO BE FILLED OUT BY APPOINTING AUTHORITY**

**28. Indicate any exceptions or additions to the statements of the employee(s) or supervisor.**

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

\_\_\_\_\_  
Appointing Authority's Signature

\_\_\_\_\_  
Date