

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) Financial and Administrative Services
4. Civil Service Position Code Description General Office Assistant-E	10. Division Office of Departmental Services
5. Working Title (What the agency calls the position) General Office Assistant	11. Section Facility, Mail and Data Operations
6. Name and Position Code Description of Direct Supervisor VACANT; OFFICE SUPERVISOR-2	12. Unit Data Operations
7. Name and Position Code Description of Second Level Supervisor SCHRAY, LORI L; DEPARTMENTAL SUPERVISOR-3	13. Work Location (City and Address)/Hours of Work Operations Center, 7285 Parsons Drive, Dimondale, MI 48821 / Monday – Friday, 7:00 am – 3:30 pm
14. General Summary of Function/Purpose of Position The purpose and function of this position is to scan, data enter, and index taxpayer inbound, and historical mail, tax forms, applications and payments into various Treasury software applications. The daily processing of documents is essential to ensure timely receipt by Treasury Tax Divisions so they can assist taxpayers. The job also includes preparing documents for scanning, batching, batch control, and assisting Mail Operations with daily tasks as needed.	

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: 80

Prepare, scan, and index incoming taxpayer correspondence, tax forms, applications and other department related documents. Data enter taxpayer forms, applications, and payments into various Treasury software applications.

Individual tasks related to the duty:

- Understands and follows procedures including disclosure and confidentiality policies.
- Prepares documents and creates batches for imaging; collate, remove staples, repair pages and copy documents, label batch headers and folders by batch and tax type.
- Assigns and records system batch numbers using Excel spreadsheets.
- Operates scanner to convert paper documents to a digital image.
- Monitors captured images ensuring documents are clear and legible.
- Reports any issues that may affect image quality.
- Performs daily and monthly scanner maintenance to ensure clarity of documents.
- Enters data from tax forms, applications and payments into various system applications.
- Indexes inbound and historical correspondence, applications and tax forms using established procedures.
- Verifies data input for quality and accuracy.
- Deletes documents and batches scanned in error.
- Interprets error messages and takes corrective action reporting any equipment or software malfunctions to supervisor.
- Meets and maintains daily performance goals.
- Reports to supervisor, new forms or documents not included in current procedures.

Duty 2

General Summary:

Percentage: 20

Perform related work appropriate to the classification that promotes teamwork and change that will result in driving efficiencies within the unit. This includes assisting Mail Operations with scanning, reviewing, sorting and delivering incoming mail.

Individual tasks related to the duty:

- Attends trainings and provides feedback.
- Provides feedback and written suggestions for process improvements that affect efficiencies within the unit.
- Assists with the updating and reviewing of procedures.
- Attends meetings and participates in special projects.
- Reviews, interprets, and routes mail, reports and correspondence using established procedures.
- Processes documents using established procedures to date stamp, staple, clip, and/or batch.
- Delivers mail to proper units.
- Scans mail for anything suspicious.
- Prepares certified, registered, and other special mailings.
- Promotes a safe work environment by adhering to emergency procedures.
- Assists other Treasury divisions as needed.
- 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.

Review, interpret, data enter and route various tax forms and taxpayer correspondence to the appropriate teams and correspondence types within Treasury using established guidelines. By adhering to established guidelines it assures documents are being data entered and routed to the proper tax units so taxpayer correspondence can be promptly answered.

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

Decisions regarding work priorities, and when established procedures do not address a particular issue. Situations not previously identified during application development and time off requests.

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.

Requires sitting for long periods of time with repetitive arm and hand movement. Possible exposure to hazardous materials. Occasionally required to lift up to 20 lb. boxes (carts, tubs and batches of documents, postal tubs, postal trays, etc.). Use of scanning and mail equipment causes a dusty and noisy environment.

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, this should serve as the composite position description for General Office Assistants within Treasury Data Operations.

23. What are the essential functions of this position?

The essential duties of this position are document preparation, scanning, data entry and indexing of taxpayer inbound and historical correspondence, tax returns, applications, and payments into various Treasury software applications for processing by Treasury tax divisions. Must work well under pressure and meet scheduled deadlines. Maintain confidentiality in handling all taxpayer forms and documents. Ability to be flexible and adaptable to changes in processes and procedures. Ability to multi-task a variety of job functions and the ability to learn and retain a wide variety of functions by utilizing standard procedures. Duties also include all requirements listed in section 18 of this position description.

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

Request to reclassify to General Office Assistant-E due to Treasury's movement to a paperless work environment, Treasury Mail and Data Operations has seen a decrease in annual documents received. The Data Entry and Imaging units have been combined into one unit called Data Operations.

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

This work area functions as the centralized scanning, data entry, and indexing unit for the Department of Treasury. This unit is responsible for scanning, data entry, and indexing taxpayer inbound and historical correspondence, tax returns, applications, and payments into various Treasury software applications for processing by Treasury tax divisions.

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

EDUCATION:

Education level typically acquired through the completion of high school or a GED Certification.

EXPERIENCE:

General Office Assistant 5 – No specific type or amount of experience is required.

General Office Assistant 6 - One year of administrative support experience.

General Office Assistant E7 – Two years of administrative support experience, including one year equivalent to an intermediate level.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Ability to work both independently and as a team.
- Ability to understand and follow procedures.
- Good organizational and communication skills.
- Adaptability and flexibility with work assignments and unit changes.
- Repetitive arm and hand movements.
- Lift a minimum of 20 LBS.

CERTIFICATES, LICENSES, REGISTRATIONS:

None

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

6/4/2019

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