

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

Position Code 1. OFFCSPV2B78N

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) Tax Administration Services Bureau
4. Civil Service Position Code Description OFFICE SUPERVISOR 10	10. Division Business Taxes
5. Working Title (What the agency calls the position) Office Supervisor	11. Section
6. Name and Position Code Description of Direct Supervisor RICHARDSON, WILLIAM/THOMAS, QUINTON; DEPARTMENTAL SUPERVISOR	12. Unit
7. Name and Position Code Description of Second Level Supervisor BUDD, JASON/COLIZZI-MCCRUMB, ANGELIQUE; DEPARTMENTAL MANAGER	13. Work Location (City and Address)/Hours of Work Operations Center, Dimondale, MI 8:00am - 5:00pm Monday - Friday

14. General Summary of Function/Purpose of Position

This position serves as the supervisor of a complex work area. The primary function is to oversee the activities of the Business Tax Unit. The primary responsibilities include ensuring that consistent, accurate tax information is released to taxpayers, legislators, tax practitioners and the public, through various channels including but not limited to; Website portal, email, correspondence, tax returns, and telephone calls within the bounds of confidentiality laws. This position serves as a resource person for complex tax questions. Ensures that the unit is meeting objectives for quality standards. Ensure that tax returns are accurately and efficiently processed to completion, and ensure customers receive service that is prompt, friendly, courteous, and helpful. The position approves tax refunds and penalty/interest waivers requested by staff, including hardship claims and requests for immediate remedial action. Serves as a liaison with the Collection Services Bureau, Financial Services, and Tax Compliance Bureau regarding tax compliance and statutory provisions.

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: 35

Serve as the resource person for the unit regarding complex tax questions. Keep unit and others informed of changes to laws, rules, and procedures.

Individual tasks related to the duty:

- Provide assistance to staff in different areas of tax law, including extensive knowledge of federal/state laws, department policies, tax forms and schedules, past practice and audit procedures.
- Plan and assist with in-service training activities for staff on departmental procedures, tax processing and interpretation of tax laws.
- Determine when to apply exceptions to accepted procedures when the situation warrants.
- Responsible for maintaining favorable customer service.
- Review correspondence to ensure clarity, accuracy and compliance with departmental policies.
- Ensure staff responses comply with the department's policy on disclosure.
- Assist staff in dealing with complex, difficult tax questions or irate callers.
- Conduct research on complex tax questions, department procedures for handling taxpayer account inquiries and legal interpretation of various tax laws.
- Research includes Michigan Compiled Laws, Revenue Administrative Bulletins, West Tax Guide, Internal policy directives, and Internal Revenue Code.
- Approve refund requests and penalty/interest waivers based on contents of specific tax returns, compliance with statutory refund statute of limitations and proper payment of penalty and/or interest due as required by statute.

Duty 2

General Summary:

Percentage: 25

Monitor incoming calls, correspondence and returns received using NICE software, Customer Relationship management Software (CRM), FileNet and SAP software. Implement changes to procedures, policies and training to improve over-all quality, including new processes and legislative changes.

Individual tasks related to the duty:

- Listen to and evaluate recorded calls according to quality standards.
- Evaluate tax refunds and correspondence according to quality standards.
- Implement changes to procedures and policies to facilitate over-all improvement in quality of calls, correspondence and returns including new processes and legislative changes.
- Work with analysts and technicians in development of training sessions for staff and ensure staff receive the training.
- Participate in quality assurance calibration of evaluations to ensure consistency.

Duty 3

General Summary:

Percentage: 20

Responsible for the immediate supervision of unit staff. Perform general supervisory functions.

Individual tasks related to the duty:

- Coordinate activities by scheduling work assignments and setting priorities regarding backlogs.
- Approve usage of annual leave. Approve timesheets in SIGMA.
- Evaluate employee performance, including coaching and disciplinary action when appropriate.
- Outline, assign, and coordinate the performance of tasks for the unit.
- Select and assign staff.
- Maintain two-way communication with staff through regular staff meetings and other methods.
- Monitor workflow and manage workload to ensure work standards are being met by staff.
- Review employee work assignments and/or work techniques and answers questions on complex issues.
- Identify staff development and training needs and ensures that training is obtained.

Duty 4

General Summary:

Percentage: 10

Recommends business process improvements, changes in procedures, policies, and protocols, recommendations with regard to IT programs and information that can be added to the Web, SAP, Customer Relationship Management(CRM) systems, or Interactive Voice Response (IVR) systems to better serve taxpayers, including new processes and legislative changes.

Individual tasks related to the duty:

- Assist with the design, testing and improvement of systems.
- Inform analysts when systems are not operational.
- Monitor statistics on usage, conducts studies and surveys to recommend additional system features.
- Review accuracy of We static content.
- Participate in testing updates related to business rules and requirements.

Duty 5

General Summary:

Percentage: 10

Responsible for performing special projects and other duties as assigned.

Individual tasks related to the duty:

- Evaluate and verify employee performance to ensure quality standards established by the department are met.
- Participates in the development criteria and modifications for evaluating work and quality standards with the quality assurance section within Tax Administration including new processes and changes in legislation.
- Attend conferences and meetings regarding business tax related matters.
- Provide customer feedback on potential process improvements to staff and others in the organization.
- Liaison with the Collection Services Bureau, Accounting Services, Financial Services and the Tax Compliance Bureau regarding tax compliance and statutory provisions.
- 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.

Day to day decisions on the activities of the unit. Decisions on the application of tax statutes and appropriate responses on tax related matters. Review and approve tax refunds, refund adjustments, and penalty interest waivers and determines when exceptions need to be made. Decisions regarding whether or not to change a procedure or work process improvement to increase efficiency. Decisions on how to timely monitor, analyze and report statutory requirements and sunset provisions and budgetary requirements. Decisions on how to interpret metrics and adjust staffing or staff assignments.

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

Policy or processing changes as they impact processes in other divisions or bureaus. Highly complex and technical tax related inquiries. Major computer systems change proposals and major, new customer self-help initiatives. Significant staffing and budgetary issues. Statutory changes, administrative rule and letter ruling proposals. Periodically briefing upper management on possible continuous improvements and/or identified problem areas.

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 with extensive work utilizing a telephone and personal computer resulting in eye strain and possible ergonomic issues. Environmental conditions are consistent with that of a normal office environment. The individual may occasionally travel including overnight.

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.

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>
	TREASURY CUST SRV REPS		

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

- | | |
|--|---|
| <input checked="" type="checkbox"/> Complete and sign service ratings. | <input checked="" type="checkbox"/> Assign work. |
| <input checked="" type="checkbox"/> Provide formal written counseling. | <input checked="" type="checkbox"/> Approve work. |
| <input checked="" type="checkbox"/> Approve leave requests. | <input checked="" type="checkbox"/> Review work. |
| <input checked="" type="checkbox"/> Approve time and attendance. | <input checked="" type="checkbox"/> Provide guidance on work methods. |
| <input checked="" type="checkbox"/> Orally reprimand. | <input checked="" 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 individual oversees the activities of the unit, assigns work, and monitors performance of employees and the unit as a whole. Specifically, the essential duties include monitor incoming work, implementing changes to procedures, policies and training to improve over-all quality. The coordination of system changes for the work area. Acts as a resource person for complex tax questions. To maintain favorable customer relations. Identify criteria and modifications for evaluating work. Review and approve tax refunds, adjustments, and penalty/interest waivers in accordance with tax statutes and department policies. Includes 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.

No changes.

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

The Business Taxes Department is responsible for the timely and quality processing of business tax returns, operation of a customer service contact center and overall operational performance measurement. This position is responsible for responding to contacts from taxpayers received from various channels, web email, correspondence, tax returns, and telephone calls. Examine correct or disallow all questionable or erroneous returns and credit claims; certification of the propriety of transactions, evaluation of information from other sources; initiation, evaluation or adjustment of assessments for tax, penalty and interest; detection of fraudulent returns and claims and forwarding of such to the appropriate party for further investigation.

Position is the supervisor in a complex work environment, coordinating projects to improve customer service and the efficiencies of the unit.

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:

Office Supervisor 9 - 10

Four years of office experience involving administrative support office practices, including two years equivalent to an E7-level administrative support worker.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Self-motivated, with the ability to organize and coordinate the work of others.
- Knowledge of supervisory techniques; including organization, planning, staffing, training, and reporting.
- Ability to interpret laws, rules and regulations relative to the work. Knowledge of tax statutes would be beneficial.
- Excellent written and verbal communication skills; communicating in a professional manner.
- Ability to assess, evaluate and analyze programs, and processes, compile information, and articulate succinctly.
- Ability to manage multiple assignments simultaneously.
- Ability to establish and maintain effective relationships.
- Ability to plan, direct and coordinate work projects and work within a team environment.

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.

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