

**State of Michigan  
Civil Service Commission**

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

**Position Code**

1. OFFCSPV2B70N

**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>City Income Tax Bureau                                                       |
| <b>4. Civil Service Position Code Description</b><br>OFFICE SUPERVISOR-2                                                          | <b>10. Division</b><br>Customer Service and Processing Division                                                                      |
| <b>5. Working Title (What the agency calls the position)</b><br>Supervisor                                                        | <b>11. Section</b>                                                                                                                   |
| <b>6. Name and Position Code Description of Direct Supervisor</b><br>RAMBO, DEVON L; DEPARTMENTAL SUPERVISOR-3                    | <b>12. Unit</b>                                                                                                                      |
| <b>7. Name and Position Code Description of Second Level Supervisor</b><br>GAUDARD, GRETCHEN M; STATE ADMINISTRATIVE<br>MANAGER-1 | <b>13. Work Location (City and Address)/Hours of Work</b><br>Operations Center, Dimondale, MI<br>Monday - Friday, 8:00 AM to 5:00 PM |

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

This position supervises a complex work area and oversees the activities of the unit involved in city income tax processing and contact center activities which must be carried out in order to meet Division and Department goals and objectives.

- Ensure that consistent, accurate tax information is released to legislators, tax practitioners and the public, through telephone, e-mail and white mail, serve as a resource person for complex tax questions; set and meet objectives for quality, completeness of responses, and first stop resolution.
- Oversee and assist with collections-related calls.
- Assure customers receive service that is prompt, friendly, courteous, and helpful.
- Set and meet customer satisfaction survey objectives.
- Continually improve content and increase customer self-help options through electronic channels.
- Approve tax refunds and penalty/interest waiver requests, including hardship claims and requests for remedial action.
- Serve as resource person for complex tax questions and ensure customers receive service that is prompt, friendly, courteous, and helpful.
- Serve as liaison with Collections, Financial Services and Tax Compliance Divisions regarding tax compliance and statutory provisions.

Functions include all first line supervisory duties, e.g. setting priorities, reviewing and directing the work of 2 to 10 full-time permanent and temporary Customer Service Representatives.

**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: 50**

Oversees and directs staff, conducts surveys and prepares recommendations to improve the processing of tax returns, responses to customer inquiries via phone, mail and electronic media. Oversees the implementation of new or revised tax processing systems and procedures. Directs and coordinates the review of returns and evaluation of customer cases.

**Individual tasks related to the duty:**

- Assigns staff to specific contact channels in order to balance service level goals for each channel of contact (calls, processing returns, responding to mail, etc.).
- Attends staff meetings and presents information regarding problems and proposes solutions. Problems include managing staffing to meet service level objectives, identifying suspected fraudulent return schemes; improving productivity without significant negative impacts on revenue or enforcements; implementation difficulties or suspected system problems; and morale problems.
- Alerts management of any difficulties in attaining goals or objectives. Informs management of recommendations to improve processing procedures obtained as a result of discussions with and surveying of staff.
- 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.
- 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: 30**

Evaluates and verifies employee performance.

**Individual tasks related to the duty:**

- Reviews employee work assignments and/or work techniques and answers questions on complex tax issues and questions arising as a result of processing returns.
- Directs staff to sources for information and assists them in obtaining information from Michigan income tax returns, tax statutes and the Department's written procedures and documentation.
- Counsels and reprimands employees through established guidelines.
- Conducts, when necessary, staff meetings and assures staff are aware of Department's overall goals and objectives.
- Keeps supervisor informed of personnel problems or potential problems.
- 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 overall improvement in quality of calls, correspondence and returns including new processes and legislative changes.
- Works with analysts and techs in development of training sessions for team members and ensures training is obtained.
- Participate in quality assurance calibration of evaluations to ensure consistency.

**Duty 3**

**General Summary:**

**Percentage: 10**

Monitors staff explanations to inquiries and interpretations of applicable federal, state and local tax statutes, rules and regulations, policies and procedures. Inquiries may originate with taxpayers, practitioners, attorneys, assessors, equalization officers, local or county treasurers and other Departments.

**Individual tasks related to the duty:**

- Assures staff responses, both written and verbal, comply with the Department's policy on disclosure.
- Assists staff in dealing with complex or difficult tax questions from taxpayers, practitioners, attorneys, assessors and treasurers.
- Assist staff in dealing with irate and/or abusive calls from taxpayers and local government officials.
- Monitors activities to provide information essential to avoid potential problems and/or evaluate staff performance.
- Coordinate activities by scheduling work assignments and setting priorities regarding backlogs.

**Duty 4**

**General Summary:**

**Percentage: 5**

Selects and assigns staff.

**Individual tasks related to the duty:**

- Thorough interviewing and other selection criteria assure equal employment opportunities in hiring and promotion. Works with manager in making selections.
- Evaluate employee performance, including coaching and disciplinary action when appropriate.
- Outline, assign, and coordinate the performance of tasks for the unit.
- Maintain two-way communications 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 5**

**General Summary:**

**Percentage: 5**

Other duties as assigned.

**Individual tasks related to the duty:**

- Special projects and assignments as delegated by the Manager or Assistant Administrator.

**16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.**

The allocation of work in the most efficient manner, monitoring of backlogs and the appropriateness of assessments and disclosure.

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

When general methods and guidelines do not exist, the supervisor is consulted. Also those that require a change in policy and/or procedures that may negatively impact employee morale or if an employee is suspected of violating internal control procedures in an attempt to defraud the state, the manager would be contacted and a course of action would be determined.

**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 periodic work at a computer terminal. The individual must answer telephone calls from taxpayers and their preparers periodically. The individual may also have to occasionally transport containers weighing between 10 and 20 pounds.

**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<br>SRV REP 6-E8s |             |                    |
|             | TREASURY CUST SRV REP<br>9s    |             |                    |

**Additional Subordinates**

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

- |   |                                    |   |                                   |
|---|------------------------------------|---|-----------------------------------|
| Y | Complete and sign service ratings. | Y | Assign work.                      |
| Y | Provide formal written counseling. | Y | Approve work.                     |
| Y | Approve leave requests.            | Y | Review work.                      |
| Y | Approve time and attendance.       | Y | Provide guidance on work methods. |
| Y | Orally reprimand.                  | Y | 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?**

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- Assure customers receive service that is prompt, friendly, courteous, and helpful.
- Set and meet customer satisfaction survey objectives.
- Continually improve content and increase customer self-help options through electronic channels.
- Approve tax refunds and penalty/interest waiver requests, including hardship claims and requests for remedial action.
- Serve as resource person for complex tax questions and ensure customers receive service that is prompt, friendly, courteous, and helpful.
- Serve as liaison with Collections, Financial Services and Tax Compliance Divisions regarding tax compliance and statutory provisions.

Functions include all first line supervisory duties, e.g. setting priorities, reviewing and directing the work of 2 to 10 full-time permanent and temporary Customer Service Representatives.

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

Very minor changes made to position description. Updated to display the new City Income Tax Bureau that was formed several months ago. Last PD update was over 5 years ago and Treasury is required to update PDs that have not been updated since then.

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

The City Income Tax Bureau is responsible for the timely and quality processing of Individual Income Tax returns, Contact Center management and overall operational performance measurement. The supervisor position is responsible for managing front line staff involved in the processing of city income tax returns and responding to taxpayer inquiries via phone, mail, and electronic media. In addition, the supervisor will be responsible for monitoring the accuracy and appropriateness of processed returns and customer interactions in regard to fraud and disclosure.

**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 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:**

The employee should possess a thorough knowledge and understanding of appropriate tax laws, rules and regulations; should be self-motivated; possess leadership abilities; be team oriented and possess analytical and problem-solving skills. Excellent verbal and written communication skills are also needed. The employee should also have a thorough understanding of the techniques needed for effective delegation of authority and responsibility. Equivalent combinations of education and experience which provide the required knowledge, skills and abilities that will be evaluated on an individual basis. Contact center experience or production-oriented experience are 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.

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