

Position Code

POSITION DESCRIPTION

<p>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.</p>	
<p>2. Employee's Name (Last, First, M.I.)</p>	<p>8. Department/Agency TREASURY CENTRAL PAYROLL</p>
<p>3. Employee Identification Number</p>	<p>9. Bureau (Institution, Board, or Commission) Tax Administration Services Bureau</p>
<p>4. Civil Service Position Code Description Office Supervisor-2</p>	<p>10. Division Individual Income Tax</p>
<p>5. Working Title (What the agency calls the position) Supervisor</p>	<p>11. Section Return Processing</p>
<p>6. Name and Position Code Description of Direct Supervisor ROSENDALE, MATTHEW S; DEPARTMENTAL SUPERVISOR-3</p>	<p>12. Unit Process and Review</p>
<p>7. Name and Position Code Description of Second Level Supervisor BURTON, LAWRENCE; DEPARTMENTAL MANAGER</p>	<p>13. Work Location (City and Address)/Hours of Work Operations Center, 7285 Parsons Drive, Dimondale, Mi 48821 / Monday - Friday, 8:00 am to 5:00 pm</p>
<p>14. General Summary of Function/Purpose of Position</p> <p>This position supervises a complex work area and oversees the unit's tax processing activities which must be carried out to meet Division and Department goals and objectives. This includes: 1) supervising staff who are responsible for reviewing/processing individual income tax returns, initiating, and reviewing associated correspondence; 2) providing consistent, accurate information to taxpayers, tax professionals, legislators, and management via telephone and written communication; 3) serving as a resource person for complex tax questions and providing guidance to staff; 4) promoting an environment conducive to continuous improvement in a teamwork setting.</p>	

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: 60

Oversees and directs staff who are responsible for reviewing/processing individual income tax returns, initiating and reviewing associated correspondence and assessments.

Individual tasks related to the duty:

- Facilitates regular staff meetings to share information and provide opportunity for open discussion with unit staff. Ensures staff are aware of Division/Department goals and objectives.
- Coordinates activities by setting priorities and directing the work of the unit.
- Provides assistance to unit staff on complex tax issues using extensive knowledge of state and federal tax laws and Department policies and procedures.
- 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, and own experience.
- 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.
- Determines when to apply exceptions to accepted procedures when the situation warrants.
- Reviews staff work assignments and/or work techniques and answer questions arising as a result of those work assignments; ensuring accuracy and compliance with Departmental policies.
- Conducts research on complex tax questions, Department procedures, and legal interpretation of various tax laws.
- Approves refund requests and assessments based on contents of specific tax returns, compliance with statutory refund statute of limitations and proper payment of tax, penalty, interest due as required by statute.
- Works directly with Division's Systems Support staff on the implementation of or changes to processing systems.

Duty 2

General Summary:

Percentage: 30

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

Individual tasks related to the duty:

- Conducts career planning and growth conversations with employees.
- Evaluates employee performance to ensure quality and production standards are met. Conducts formal written Performance Management evaluations.
- Conducts coaching conversations with staff, addresses disciplinary issues, and takes appropriate action.
- Selects and assigns staff, ensuring equal employment opportunity in hiring and promotion. Works with direct supervisor and manager in making selection.
- Approves usage of leave credits. Approve timesheets in SIGMA.
- Identifies staff development and training needs and ensures that training is obtained.
- Keeps direct supervisor and manager informed of personnel problems or potential problems.
- Works with training resources in development of training sessions for staff.
- Identifies staff development and training needs and ensures that training is obtained.
- Participate in quality assurance calibration of evaluations.

Duty 3

General Summary:

Percentage: 10

Other duties as assigned.

Individual tasks related to the duty:

- Conducts or attends conferences or meetings regarding individual income tax matters.
- Participates in the development of and modifications to criteria for evaluating work.

- Performs 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 regarding the activities of the unit.
- Decisions on the application of tax statutes and appropriate responses related to tax matters.
- Review and approve tax refunds, refund adjustments, penalty and interest, and determine when exceptions need to be made.
- Monitoring and addressing staff backlogs.
- Monitoring and addressing staff performance in relation to Division standards.

These decisions affect individual income taxpayers and the image of the Department and the State.

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

- Recommendations to change a process or procedure.
- When general methods and guidelines do not exist, the supervisor is consulted.
- Policy or processing changes as they impact processes in other Divisions or Bureaus.
- Computer system change proposals.
- If an employee is suspected of violating internal control procedures in an attempt to defraud the State, the supervisor would be contacted, and a course of action determined.
- Next higher-level refund approvals.
- Replacement of staff.
- All matters that would have a potential negative consequence for the Department or taxpayers.

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 may communicate with tax professionals periodically. The individual may also have to occasionally transport containers weighing between 10 and 20 pounds. Environmental conditions are consistent with that of a normal office 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.

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>
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HARTIGAN, SHELLY	CALCULATIONS ASSISTANT-A 8	ROBINSON, KAYLA	CALCULATIONS ASSISTANT-E 5/6/7
DRAKE, PAM	CALCULATIONS ASSISTANT-E 8	VACANT	CALCULATIONS ASSISTANT-A 5/6/7
COLEMAN, JENNIFER	CALCULATIONS ASSISTANT-A 8		
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 type="checkbox"/> Assign work.
<input checked="" type="checkbox"/> Provide formal written counseling.	<input checked="" type="checkbox"/> Approve work.
<input type="checkbox"/> Approve leave requests.	<input checked="" type="checkbox"/> Review work.
<input checked="" type="checkbox"/> Approve time and attendance.	<input 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 is responsible for carrying out the specific supervisory duties necessary to assure the Division's and Department's goals and objectives are achieved. The individual oversees and directs daily activities for the unit and ensures adherence with policies, procedures, and guidelines.

The essential duties include all requirements identified 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.

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 the examination, correction or disallowance of all questionable or erroneous returns; certification of the propriety of transactions; analysis of information from other sources; initiation, evaluation or adjustment of assessments for tax, penalty and interest; detection of fraudulent returns and forwarding of such to the appropriate party for further investigation; and communication of interpretations and applications of statutes, policies, rules, etc. to taxpayers and tax professionals. The unit supervisor monitors staff performance and priorities to ensure deadlines are met. And, promotes an environment conducive to continuous improvement in a teamwork environment.

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

KNOWLEDGE, SKILLS, AND ABILITIES:

- Knowledge and understanding of supervisory techniques; including organization, planning, staffing, training and reporting.
- Ability to organize and coordinate the work of others.
- Ability to interpret laws, rules and regulations relative to the work. Thorough knowledge and understanding of the Michigan and federal income tax laws, rules and regulations is desirable.
- Be self-motivated, possess leadership abilities, and be team oriented.
- Possess analytical and problem-solving skills.
- Excellent verbal and written communication skills; communicating in a professional manner.
- Ability to manage multiple assignments simultaneously.
- Ability to establish and maintain effective relationships.
- Ability to motivate staff.
- Thorough understanding of the techniques needed for effective delegation.
- Ability to maintain favorable public relations.
- Experience in a production oriented environment is desirable.

Equivalent combinations of education and experience which provide the required knowledge, skills and abilities that will be evaluated on an individual basis.

**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.

SONYA CARTER

5/23/2019

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