

1. Position Code
DHLGSECA

State of Michigan
Department of Civil Service
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.**

2. Employee's Name (Last, First, M.I.)	8. Department/Agency ATTORNEY GENERAL DEPARTMENT
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) ENVIRONMENT AND GOVERNMENT OPERATIONS BUREAU
4. Civil Service Classification of Position DIVISION LEGAL SECY SUPERVISOR-10	10. Division REVENUE AND TAX DIVISION
5. Working Title of Position (What the agency titles the position) SECTION HEAD SECRETARY	11. Section SUBSTANTIVE TAX SECTION
6. Name and Classification of Direct Supervisor KIMBERLY A. WILCOX DIVISION LEGAL SECRETARY SUPERVISOR	12. Unit 6200
7. Name and Classification of Next Higher Level Supervisor BRADLEY K. MORTON REVENUE AND TAX DIVISION CHIEF	13. Work Location (City and Address)/Hours of Work 525 W. OTTAWA STREET MON – FRI 8:00 A.M. – 5:00 P.M.

14. General Summary of Function/Purpose of Position

This position provides first-line supervisory and advanced legal secretarial duties within the Revenue and Tax Division performing the most complex administrative legal secretarial activities, which are highly confidential and sensitive, for senior and section head attorneys, and the division chief. These activities include supervising at least two legal secretary 7/8/9 employees, opening and closing files in Legal Files; compiling department reports; assisting in the oversight of unit or section assignments; scheduling hearings; preparing legal documents and correspondence; docketing cases and maintaining calendars; serving as a resource person for other support staff regarding relevant programs, systems, databases, etc.; providing guidance, training and serving as a mentor to other support staff; and other duties required to meet the goals and objectives of the department. The position requires supervisory and advanced legal secretarial and administrative skills; knowledge of department protocols, procedures, and software; and the ability to exercise discretion, act independently, and communicate effectively.

For Civil Service Use Only

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%

Employee monitors the work flow within the unit/section and supervises at least two other legal secretaries assigned to the unit/section. Deals with sensitive and confidential matters. Generates, files, and distributes copies of pleadings and related documents with various courts and opposing parties by the appropriate due date in complex litigation or administrative matters being handled by senior and section head attorneys. Handles any other assignment relating to the successful performance of the duties, goals, and objectives of the Department.

Individual tasks related to the duty.

- Provide legal secretarial services for the senior and section head attorneys, in complex cases in state and federal courts, including coordinating the preparation, organization, and filing of all documents and other work specific to a case file.
- Serve as first-line supervisor to at least two legal secretaries within the division.
- Type, format, proofread, archive, print, and file pleadings, briefs, discovery responses, and related documents for filing in trial and appellate courts.
- Independently compose and prepare routine letters and memoranda, including sensitive personnel matters.
- Coordinate assembly of documents related to discovery requests, prepare subpoenas for documents and witnesses for depositions and trial, schedule court appearances, and assemble documents and exhibits for hearings or trials.
- Maintain and regularly review dockets and calendar for assigned attorneys to avoid scheduling conflicts and track court-imposed deadlines.
- Serve as the liaison with federal and state courts regarding procedural, formatting, filing, and other requirements, including e-filing.
- Operate keyboard equipment such as personal computers, and multi-function machines to docket cases, process information, record notices of hearings or postponements, correspondence, reports, and other data.
- Coordinate staff compliance with the requirements of MCL 205.28(1)(f) and Department e-discovery policy and procedures.

Duty 2

General Summary of Duty 2

% of Time 15%

Serve as back-up to division head secretary supervisor. Perform related division assignments as needed. Supervise/mentor new secretarial staff assigned to the division, and provide training as necessary. Make recommendations for improving efficiency of operations.

Individual tasks related to the duty.

- Assist in the preparation of the department's and client agencies' monthly reports regarding workloads and money collected and saved the State.
- Maintain SAAG and expert witness contract files for Revenue and Tax Division..
- Assist with time keeping and other personnel matters.
- Assist in coordinating the administrative support staff activities for the division.
- Perform highly confidential and sensitive assignments for the division management, as needed.
- Serve as liaison between section heads, the chief of the division, or the head legal secretary, and staff or others.
- Transmit directives, instructions, and assignments from division management; and follow up on the status of assignments.
- Serve as a mentor for new staff and as a resource for secretarial staff regarding changes to court and department procedures and protocols that impact the work of the division.
- Propose changes to forms, procedures, formats, and standards for office form documents.

Duty 3

General Summary of Duty 3

% of Time 15

Independent preparation and maintenance of unit and section's reports, files, records, and miscellaneous correspondence.

Individual tasks related to the duty.

- Open, update, and close files on the department's Legal Files database.
- Input, retrieve, update, and delete information using other programs and databases.
- Research information regarding cases. Review case lists for assigned attorneys to check accuracy, bringing changes or revisions regarding cases to the attention of the appropriate section head.
- Compile reports as required by the Department relating to the Revenue and Tax Division.
- Serve as a resource to assigned attorneys and secretaries regarding on-going information processing and case management functions.
- Reports monies awarded to or paid by the State for Revenue and Tax Division cases for monthly reporting purposes.
- Prepare and send files to the State Record Center. This includes entering data into the Versatile System, as well as printing and affixing bar code labels to each itemized file. In addition, verifies accuracy of the division's master list of files sent to the Record Center.

Duty 4

General Summary of Duty 4

% of Time 15%

Create and maintain case and general assignment files, and calendars for assigned attorneys. Assist section heads with oversight of section attorneys.

Individual tasks related to the duty.

- Maintain and update calendars for assigned attorneys.
- Review calendars daily to prioritize your own work, and assist attorneys with meeting deadlines and ensure attendance at scheduled meetings and court appearances.
- Meet weekly with assigned attorneys and section heads to identify upcoming events and projects.
- Keep litigation and general assignment files for assigned attorneys organized and updated.
- Identify potential litigation or general assignment files that can be closed, and follow-up with attorneys.
- Provide case lists and calendars for attorneys as requested by division managers.
- Compile information regarding attorneys' workloads and schedule as requested by division managers.

Duty 5

General Summary of Duty 5

% of Time 10%

Place, receive, and screen telephone calls. Process, sort, organize, and prioritize electronic and hardcopy mail.

Individual tasks related to the duty.

- Receive and screen telephone calls and email from the client agencies, opposing counsel, and the public.
- Independently respond to inquiries on a variety of matters such as the status of pending cases, hearing dates, staff assignments, and other general information.
- Direct calls regarding client activities or programs to the appropriate agencies.
- Place and return phone calls to courts regarding case status, scheduling, and other procedural matters.
- Log messages and present them to attorneys when they are not available to personally take them.
- Sort, prioritize, and distribute mail for assigned attorneys. Calendar deadlines and hearing dates, highlight important information, and provide proposed responses, as appropriate.

Duty 6

General Summary of Duty 6

% of Time 10%

Miscellaneous duties, including scheduling meetings, arranging travel, attending training, and maintaining notebooks or other databases.

Individual tasks related to the duty.

- Schedule and arrange non-litigation meetings and conferences.
- Arrange travel for staff including scheduling transportation and making hotel reservations.
- Oversee the boxing and sending of closed cases to Record Center for assigned attorneys.
- Process requests for filing fees.
- Maintain and update notebooks or other databases containing filing procedures, e-filing, document formatting, scheduling hearings, and other procedural matters for individual courts.
- Maintain and update notebooks or other databases containing individual judges' filing and other unique procedures or requirements.
- Other assignments required to meet the goals and objectives of the division and the department.

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.

Organize litigation and general assignment case files. Answer inquiries from other personnel, along with the public, and direct them to appropriate personnel. Manage the schedule for assigned attorneys including providing dates and times for depositions, hearings and meetings. Recognize the need for training and develop and coordinate training materials. Coordinate division staff compliance with MCL 205.28(1)(f) and Department document e-discovery protocols.

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

When situations or questions arise which involve procedures or certain supervisory decisions as to problems which have not previously arisen or at any time when unsure of proper procedure or supervisor's viewpoint.

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.

Work is performed in an office setting often sitting for long periods in front of a computer. The position requires occasional lifting, bending, walking, standing and crouching.

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>
Kellie Christopher	Legal Secretary		
Reatha Gates	Legal Secretary		
Vacant (Interviewing 7/2023)	Legal Secretary		

20. My responsibility for the above-listed employees includes the following (check as many as apply):

- | | |
|--|---|
| ☒ Complete and sign service ratings. | ☒ Assign work. |
| ☒ Provide formal written counseling. | ☒ Approve work. |
| ☒ Approve leave requests. | ☒ Review work. |
| ☒ Approve time and attendance. | ☒ Provide guidance on work methods. |
| ☒ Orally reprimand. | ☒ Train employees in the work. |

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

Signature

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?**

N/A new position

- 23. What are the essential duties of this position?**

Provide first-line supervisory and advanced legal secretary activities and support for assigned attorneys within the Revenue and Tax Division in the most complex litigation cases. The assignments include preparation of complex legal documents and correspondence. Maintaining case files and assigned attorneys' calendars and schedules. Various other legal clerical duties as assigned. Liaison with federal or state courts on procedural, formatting, filing and other matters. Train and supervise secretarial staff on changes to court protocols, filing requirements, formatting, deadlines and due dates. Serve as resource person to other staff within the division and/or practice group. Ability to work with senior staff, including division chief, first assistant, and section head attorneys. Due to internal conflicts, must be able to work independently and maintain strictest confidentiality.

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

N/A new position

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

The Revenue and Tax Division is responsible for various facets of legal activities, including legal counsel, representation, collection and bankruptcy on behalf of the State of Michigan, Dep't of Treasury. This position provides legal secretarial services for assigned attorneys and clerical support for the Division Head Legal Secretary in maintaining office records, coordinates with personnel from the federal or state courts on e-filing policies and procedures, and other matters, and trains and supervises other secretarial staff.

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

EDUCATION:

High School diploma or equivalent experience.

EXPERIENCE:

As described in applicable Civil Service job specifications.

KNOWLEDGE, SKILLS, AND ABILITIES:

All requisite legal secretarial skills are required as well as exceptional organizational skills. Well developed oral and written communication skills. Ability to prioritize assignments and to handle multiple assignments concurrently. Considerable knowledge of e-filing requirements by various courts. Considerable experience and knowledge of personal computer and multi-function machines (scanning, faxing, copying, printing). Extensive working knowledge of Department's Legal Files reporting system is highly desired. Ability to effectively deal with people, work well under highly stressful conditions, follow complex instructions, and use diplomacy and discretion.

CERTIFICATES, LICENSES, REGISTRATIONS:

N/A

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