

<b>Position Code</b> 1.
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**State of Michigan**  
**Civil Service Commission**  
Capitol Commons Center, P.O. Box 30002  
Lansing, MI 48909  
**POSITION DESCRIPTION**

This position description serves as the official classification document of record for this position. Please complete this form 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>
	Treasury
<b>3. Employee Identification Number</b>	<b>9. Bureau (Institution, Board, or Commission)</b>
	Tax Compliance Bureau
<b>4. Civil Service Position Code Description</b>	<b>10. Division</b>
Secretary 9	Audit Division
<b>5. Working Title (What the agency calls the position)</b>	<b>11. Section</b>
Secretary	
<b>6. Name and Position Code Description of Direct Supervisor</b>	<b>12. Unit</b>
State Administrative Manager 15	
<b>7. Name and Position Code Description of Second Level Supervisor</b>	<b>13. Work Location (City and Address)/Hours of Work</b>
State Division Administrator 17	Various
<b>14. General Summary of Function/Purpose of Position</b>	
<p>Perform advanced secretarial and assistant assignments for State Administrative Manager and professional staff, in support of the ongoing operational procedures of the office. Secretarial assignments include such duties as: routing phone calls, sorting and distributing incoming and outgoing mail, scheduling meetings, assisting visitors, preparing and maintaining office records, reports, correspondence, office equipment, inventory, and process time and attendance. Management assistant assignments include serving as manager's liaison to professional staff, Audit Division Administrator and TCB Director. Also, provides managerial assistance by assuming responsibility for managers' calendar, e-mail, and voicemail when required. Prepares audit reports, conducts research and manages inventory &amp; field audit functions of case file management system at direction of State Administrative Manager.</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 of Duty 1**                      **% of Time 30**\_\_\_\_\_

Maintains and assists Audit Manager in the inventory and field audit functions of case file management system. Prepares reports and conducts research at direction of State Administrative Manager.

**Individual tasks related to the duty.**

- Prepares monthly and quarterly reports from the case file management inventory & field audit functions.
- Issues audit assignments electronically to supervisors at direction of State Administrative Manager.
- Verifies and checks the accuracy of completed and submitted audit assignments. Ensures all critical fields are completed and accurate prior to submission for audit review.
- Independently compile, analyze, and summarize various reports which include, audit assignment inventory, travel reports, "Other Hours" worked and number of hours on assignments. Make recommendations to State Administrative Manager.
- Develop procedures for corresponding with taxpayers or other employees.
- Query tax research tool, case file management system and auditors regarding case file activity; compile results of research and make recommendations.

Duty 2

**General Summary of Duty 2**                      **% of Time 20**\_\_\_\_\_

Serve as State Administrative Manager liaison with professional staff by transmitting information, explaining appropriate work instructions, and following up on assignments; serve as State Administrative Manager liaison with Audit Administrator and TCB Director by transmitting requested information and following up on issues brought to the State Administrative Manager's attention.

Secretarial assignments include such duties as routing phone calls, monitoring phone system problems or location changes, sorting and distributing incoming and outgoing mail.

**Individual tasks related to the duty.**

- Provides managerial assistance to State Administrative Manager. Work with subordinate staff, pulling together information for manager, administrator, bureau director, etc.
- Transmitting information or work assignments from State Administrative Manager to professional staff; follow up on assignments to ensure work is properly delegated and projects are completed in a timely manner.
- Direct phone calls to appropriate professional staff and coordinate taxpayer contact by phone, email and in person.
- Handle all incoming mail (open, sort, date stamp) distribute to appropriate professional staff.
- Reads incoming correspondence and reports, screening those items that can be handled personally and forwarding the rest to supervisors and auditors.
- Distributes, faxes and photocopies or e-mails, bulletins, letters, instructions, determinations, etc. to professional staff.

Duty 3

**General Summary of Duty 3**                      % of Time 20 \_\_\_\_

Prepare hearing files for Legal and Hearings as directed by State Administrative Manager at the formal appeals level.

**Individual tasks related to the duty.**

- Prepare audit management files (case files) for review by hearing officers.
- Coordinate additional requirements of professional staff in preparation for informal conference.
- Verify information and conduct research at the direction of State Administrative Manager to ensure audit issues are clear and defensible at the formal appeals level.

Duty 4

**General Summary of Duty 4**                      % of Time 10 \_\_\_\_

Maintains and monitors regional office computer inventory, master office files, office machines, repairs and maintenance contracts.

**Individual tasks related to the duty.**

- Determines office supplies needed and orders office supplies, equipment, repair and maintenance services through appropriate agency channels.
- Submits an annual inventory of office equipment and furniture.
- Monitors copier use, repairs, and supplies.
- Monitors Multifax use, repairs, and supplies.
- Maintains office master files, logs, expense reports, etc.
- Maintains confidentiality of documents and information received.
- Keeps informed of office details and advises supervisor of problems.
- Contact person for Building Manager.

Duty 5

**General Summary of Duty 5**                      % of Time 10 \_\_\_\_\_

Prepares payroll for professional staff and maintains confidentiality of personnel information and reports.

**Individual tasks related to the duty.**

- Prepares biweekly payroll for audit staff and maintains other personnel records.
- Maintains confidentiality of documents and information received.
- Coordinates personnel issues with bureau Human Resource Liaisons.

Duty 6

**General Summary of Duty 6**                      % of Time 10 \_\_\_\_\_

Perform other related essential functions as may be appropriate and non-essential functions as may be required and/or assigned by the State Administrative Manager.

**Individual tasks related to the duty.**

- Gather data for surveys, special subjects or projects.
- Prepare, proofread and edit letters, emails, memos, reports and other documents to taxpayers from professional staff.
- Schedule meetings, notifies interested parties, and assembles related necessary materials.
- Schedule meetings and makes commitments on behalf of State Administrative Manager to attend meetings, conferences and training without first checking with the State Administrative Manager.
- Makes travel arrangements for State Administrative Manager and professional staff.
- Regularly communicates with State Administrative Manager regarding personnel matters and taxpayer issues.

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

Duties using judgment where alternatives are determined by policies, procedures and past practices. Personal judgment based on prior experience. Knowledge of supervisor's viewpoint. Request from Manager, supervisors, or auditors, for specific action.

Affected by those decisions: Manager, supervisors, auditors, the public and professional staff.

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

Manager decides specific tax technical correspondence, e-mails, reports, bulletins, rulings, directives, confidential personnel issues, etc., to distribute/forward to Audit Administrator, supervisors, auditors, and taxpayers.

**18. What kind of physical effort is used to perform this job? What environmental conditions is this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.**

General office setting; lighting and air temperature. The individual must work at a desk for long periods of time. This job requires extensive use of a personal computer. The individual must answer telephone calls from taxpayers and their preparers. 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. (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>


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

23. What are the essential functions of this position?

Coordinate office activities and perform secretarial assignments for State Administrative Manager and professional staff in support of the ongoing operations of the office. Provides backup support to the State Administrative Manager when required and monitors his calendar, e-mail, and voicemail. Maintains and assists State Administrative Manager in the inventory and field audit functions of case file management system technologies (audit inventory tracking system).

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

Position description updated to reflect current reporting structure from Audit Manager 15 to State Administrative Manager 15. Minor updates throughout PD to reflect current verbiage and physical effort. Essential functions/duties have not significantly changed.

**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 to audit businesses and individuals within and outside the State of Michigan for compliance with taxes administered by the Department of Treasury. This position acts as the secretarial/administrative support for a State Administrative Manager 15.

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

**EDUCATION:**

Education level typically acquired through completion of high school.

**EXPERIENCE:**

Four years of administrative support experience where use of a personal computer to prepare correspondence, reports, charts, etc., or to enter/retrieve/update information is an essential part of the work, including two years equivalent to experienced E7 level administrative support work or equivalent to a Secretary 7, or Legal Secretary 7; or four years of administrative support experience where use of a personal computer to prepare correspondence, reports, charts, etc., or to enter/retrieve/update transactions is an essential part of the work, including one year equivalent to advanced 8 level administrative support work or equivalent to a Secretary E8, or Legal Secretary E8.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

Knowledge of office practices, procedures, Computer software, calculator, phone systems

Knowledge of correct English usage, spelling and punctuation

Skill in typing

Ability to determine work priorities

Ability to maintain composure, efficiency, confidentiality and good public/employee relations when working under deadlines and heavy workloads.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

Possession of a current certification as a Certified Professional Secretary (CPS) may be substituted for one year of Secretary E8 experience.

*NOTE: Civil Service approval of this position does not constitute agreement with or acceptance of the desirable qualifications for 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's Signature

\_\_\_\_\_  
Date

**TO BE FILLED OUT BY APPOINTING AUTHORITY**

Indicate any exceptions or additions to statements of the employee(s) or supervisors.

*I certify that the entries on these pages are accurate and complete.*

\_\_\_\_\_  
Appointing Authority Signature

\_\_\_\_\_  
Date

**TO BE FILLED OUT BY EMPLOYEE**

*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's Signature

\_\_\_\_\_  
Date

**NOTE: Make a copy of this form for your records.**