State of Michigan
Civil Service Commission

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

Position Code
1. TREACSREA05R

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 TREASURY CUST SRV REP-E	**10. Division** Individual Income Tax
5. Working Title (What the agency calls the position) Customer Service Representative	**11. Section** Customer Contact
6. Name and Position Code Description of Direct Supervisor VARIOUS ; OFFICE SUPERVISOR-2	**12. Unit**
7. Name and Position Code Description of Second Level Supervisor DALMAN, MARILYN K; DEPARTMENTAL MANAGER-2	**13. Work Location (City and Address)/Hours of Work** Operations Center, Dimondale, MI / Monday-Friday 8:00a.m. - 5:00p.m.

14. General Summary of Function/Purpose of Position

Position serves as the primary customer contact in a multi -channel service center environment utilizing knowledge base and case management tools to assist customers. Communicating with the public via the telephone, e-mail, white mail answering tax questions, explaining billings, assisting in the preparation of income tax returns. This position also communicates with the public via e-service tools to answer account specific questions. Explains the Income Tax Act and procedures involved in the preparation and correction of an income tax return to the taxpayer, departmental policies and procedure, and points of law. Utilizes knowledge base information to answer customer inquiries. Performs all work in accordance with established contact center standards.

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**

In a multi-channel service contact center environment, interacts with customers via telephone, CRM web, email, and IVR requests to answer questions and provide assistance while understanding forms and adjustments to accounts. Process and respond to imaged responses from taxpayers.

Individual tasks related to the duty:

- Utilize knowledge base information to answer customer inquiries.
- Research reference materials available such as the West Tax Guides, memorandums explaining tax law changes, income tax booklet, income tax procedure manuals, etc to find answers to questions.
- Ask additional questions of the caller to ensure an understanding of the case.
- Respond to questions with options a taxpayer may have on any given issue.
- Explain Michigan tax laws, rules, or regulations to customer and assist customers in completing tax returns.
- Respond to incoming calls regarding income tax refunds.
- Explain the disposition of a given credit.
- Explain the offset process tot he taxpayer and the legal basis for the offset of a refund.
- Explain statutory guidelines for prior year refunds.
- Input, update/retrieve information from various systems including Siebel(CRM), legacy tax and collection systems.
- Process imaged correspondence responses from taxpayers using appropriate systems and work procedures.

Duty 2

General Summary: **Percentage: 20**

Interacts with customers via telephone to provide assistance in understanding adjustments to accounts that result in a collection matter.

Individual tasks related to the duty:

- Provide information to a customer questions regarding billings.
- uses knowledge base information to answer customer inquiries.
- Research the account receivable system to determine the status of an assessed liability.
- Explain the application of payments.
- Explain the basis for assessments.
- provide collection breakdown letter with balance and account summary.
- Explain how to request a waiver of penalty.
- Input, update/retrieve information from various systems including Siebel(CRM, legacy tax and collection systems.

Duty 3

General Summary: **Percentage: 15**

Respond to general inquiries that require redirection of routing, assist less experienced representatives as necessary in responding to inquiries.

Individual tasks related to the duty:

- Research account to locate and apply payments.
- Explain adjustment to a refund.
- Process interdepartmental adjustments.
- Alerts supervisor or technician when there is confusion or absence of information in the knowledge base to answer questions.

Duty 4

General Summary: **Percentage: 5**

Other related duties as assigned.

Individual tasks related to the duty:

- Interacts with walk-in customers using appropriate customer service techniques.
- Compile and prepares various reports.
- Alerts supervisor or technician when there is unclear or absence of information in the knowledge base to answer questions.
- Assists less-experienced representatives, as necessary.
- The experienced level person participates in the training of other Treasury customer service representatives or new employees.

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

Whether to refer an account to another Division. Whether a refund offset is valid, if not, how to correct it.

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

Potentially fraudulent claims.

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.

This is an office environment, and individuals must work at a desk for long periods of time with extensive use of a personal computer and telephone. Individuals on occasion need to 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.

Additional Subordinates

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

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

As a representative of the Department, this position interacts with customers in a contact center environment utilizing knowledge base and case management tools to answer questions and resolving account problems using appropriate customer service techniques. Includes all requirements listed in Section 18 of this PD.

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

This is an update. There is no change to the essential functions of the position.

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

The function of the work unit is to provide information and answers to taxpayer inquiries regarding individual's income tax and other tax matters. This position's primary function is to serve as the primary customer contact in a multi-channel service center environment utilizing knowledge base and case management tools to resolve taxpayer inquiries concerning tax refunds and other related matters, including collection issues.

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:

Treasury Customer Service Representative 6: One year of experience responding to customer inquiries and resolving problems.

Treasury Customer Service Representative 7: Two years of experience responding to customer inquiries and resolving problems, including one year equivalent to a Treasury Customer Service Representative 6.

Treasury Customer Service Representative E8: Three years of experience responding to customer inquiries and resolving problems, including two years equivalent to a Treasury Customer Service Representative 6 or one year equivalent to a Treasury Customer Service Representative 7.

KNOWLEDGE, SKILLS, AND ABILITIES:

Employee must be able to effectively communicate with the public, analyze the situation regarding tax related matters and resolve them. Employee must develop a good understanding of the State of Michigan and Federal Income Tax Laws and the internal workings of the Tax Administration Services Bureau.

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.

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