

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 Treasury Cust Srv Rep-E</p>	<p>10. Division Business Taxes</p>
<p>5. Working Title (What the agency calls the position) Customer Service Representative</p>	<p>11. Section SUW TP Contact & processing</p>
<p>6. Name and Position Code Description of Direct Supervisor Various; OFFICE SUPERVISOR-2</p>	<p>12. Unit</p>
<p>7. Name and Position Code Description of Second Level Supervisor WILBUR, MICHAEL; DEPARTMENTAL MANAGER-2</p>	<p>13. Work Location (City and Address)/Hours of Work Operations Center, Dimondale, MI / Monday – Friday 8:00 – 5:00</p>
<p>14. General Summary of Function/Purpose of Position</p> <p>Position serves as the primary customer contact in a service center environment utilizing knowledge base and case management tools to assist customers. The purpose of this position is to communicate with the public via the telephone, e-service or white mail. Answer questions, explain billings and assist with the preparation of Michigan business taxes returns. Understand and explain procedures involved in the preparation and correction of a tax return to the taxpayer. Understand how departmental policies and procedures, and points of law affect the taxpayer. Utilize a knowledge base information to answer taxpayer inquiries. Perform all work in accordance with established service center standards.</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: 40

In a service center environment, interacts with customers and responds to routine related questions from telephone calls regarding Michigan business taxes, including filing requirements, line-by-line instructions, payment verification and penalty and interest amounts.

Individual tasks related to the duty:

- Uses appropriate customer service techniques while providing information.
- Inputs, updates and/or retrieves information from various state automated systems including SIEBEL (Customer Relationship Management), Genesys, SAP, Legacy Tax and collection systems.
- Documents all contacts and outcomes within SIEBEL (CRM).
- Creates detailed notes in SAP and Legacy as relevant to the account.
- Asks additional questions of the caller to ensure an understanding of the case.
- Reviews, communicates and explains specific tax returns including prior year returns/filings, including liabilities, credits, estimated payments, and current year data to provide answers to taxpayer questions..
- Makes decisions to escalate to appropriate staff and/or carry out steps necessary to resolve a taxpayer problem.
- Routes service requests that are complex to senior TCSR, technician or supervisor.
- Utilizes knowledge base information to answer customer inquiries.
- Complies with disclosure provisions when answering all inquiries

Duty 2

General Summary:

Percentage: 35

Reviews and handles routine correspondence received by the Division, including web mail. Corresponds with taxpayers and/or taxpayer representatives to provide explanation of changes made.

Individual tasks related to the duty:

- Interacts with customers in writing to answer questions and provide assistance in understanding adjustments to tax filing and accounts.
- Utilizes knowledge base information to answer taxpayer inquiries.
- Processes returned refund warrants received by researching for correct addresses.
- Processes returned mail received in unit by researching for correct addresses.
- Processes penalty waivers on less complex business taxes accounts.
- Answers routine correspondence including Inter-department Adjustments (IDA) and requests for refund of credits forward.
- Inputs, updates and/or retrieves information from various sources including SIEBEL (CRM), SAP, Legacy Tax and collection systems.

Duty 3

General Summary:

Percentage: 10

Processes Michigan business taxes returns that were selected for review

Individual tasks related to the duty:

- Documents all contacts and outcomes within SIEBEL (CRM)
- Reviews tax forms for completeness and accuracy.
- Reviews returns that are limited in types of income and adjustments that a taxpayer may claim, including one page forms with limited entries and adjustments.
- Inputs, updates and/or retrieves information from various state automated customer relationship, SAP, and Legacy systems.
- Interacts with customers via telephone or in writing to answer questions regarding adjustments made.
- Explains Michigan tax laws, rules and regulations to taxpayers during the review process.
- Ensures businesses are registered for all applicable taxes and forms submitted contain all the necessary information.
- Utilizes knowledge base information to answer customer inquiries

Duty 4**General Summary:****Percentage: 10**

Provides support to the senior staff and the supervisor of the unit in the completion of their duties.

Individual tasks related to the duty:

- Retrieves returns and correspondence from microfilm.
- Faxes information to taxpayers and/or preparers.
- Alerts supervisor when there is confusion or absence of information in the knowledge base to answer questions.
- Performs all work in accordance with established service center standards.
- Processes interdepartmental adjustments.
- The experienced level person participates in the training of other Treasury customer service representatives or new employees.

Duty 5**General Summary:****Percentage: 5**

Other related duties as assigned

Individual tasks related to the duty:

- Creates files and locates returns and related documents for hearings process.
- Requests payment batches from storage facility.
- Retrieves returns and documents necessary for review of specific accounts.
- Compiles and prepares various reports.
- Alerts supervisor when there is unclear or absence of information in the knowledge base to answer questions.

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

This position is responsible for applying the laws, procedures, job outlines, memos and instructions, both verbal and written, in processing routine correspondence and telephone inquiries. Decisions include whether the telephone inquiry should be escalated, whether taxpayer has provided enough information to justify a correction to the account and whether the appropriate penalty and interest were charged. This individual must have a good general understanding of the business tax acts as well as the revenue act.

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

Decisions relating to refund requests greater than \$2,500. Decisions regarding complex business tax issues including apportionment, court case issues and interpretations of statutes and rules. Decisions related to statute of limitations and disclosure of information in unusual or questionable situations. 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.

The individual must work at a desk for long periods of time. The job requires extensive use of a personal computer. The individual must answer telephone calls from taxpayers and preparers. 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 taxpayers in a service 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.

Updated PD to combine all taxes listed as general business taxes.

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

The function of the Business Taxes Division is to respond to taxpayer inquiries timely and efficiently. The TCSR is responsible for reviewing routine correspondence and answering routine telephone calls. This position's primary function is to serve as the primary customer service contact in a service center environment utilizing knowledge base and case management tools to respond taxpayer's inquiries concerning all business taxes, and 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 typically acquired through completion of high school.

EXPERIENCE:

For the Treasury Customer Service Representative 6 - one year of experience using extensive knowledge of business practices to respond to customer inquiries and resolve problems; Treasury Customer Service Representative 7 - Two years of experience using extensive knowledge of business practices to respond to customer inquiries and resolve problems, including one year equivalent to a Treasury Customer Service Representative 6; Treasury Customer Service Representative E8 - Three years of experience using extensive knowledge of business practices to respond to customer inquiries and resolve problems, including two years equivalent to a Treasury Customer Service Representative 6 or one year equivalent to a Treasury Customer Service Representative 7.

Desirable: Extensive personal computer skills.

KNOWLEDGE, SKILLS, AND ABILITIES:

The 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 Tax law and the internal workings of the Business Taxes Division. The individual must be able to follow instructions and work in a team

environment.

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.

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