

**State of Michigan
Civil Service Commission**
Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

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 Individual Income Tax</p>
<p>5. Working Title (What the agency calls the position) Customer Service Representative</p>	<p>11. Section Customer Contact</p>
<p>6. Name and Position Code Description of Direct Supervisor REMBERT, LEKEISHA; SUPERVISOR</p>	<p>12. Unit</p>
<p>7. Name and Position Code Description of Second Level Supervisor DALMAN, MARILYN K; DEPARTMENTAL MANAGER</p>	<p>13. Work Location (City and Address)/Hours of Work Operation Center 7285 Parsons Dr. Dimondale MI 48821 / Monday-Friday 8am-5pm</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. Communicating with the public via the telephone, e-mail or white mail. Requires proficiency as a bilingual Spanish/English speaker in order to service Spanish speaking customers. Answering tax questions, explaining billings, assisting in preparation of income tax returns. Explain the Income Tax Act and procedures involved in the preparation and correction of an income tax return to the taxpayer, departmental policies and procedures, and points of law. Utilizes knowledge base information to answer customer inquiries.</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: 50

In a service center environment, interacts with customers via telephone to answer questions and provide assistance in understanding forms and adjustments to account.

Individual tasks related to the duty:

Utilizes knowledge base information to answer customer inquiries. Research reference materials available such as the West Tax Guides, memorandums explaining tax law changes, the 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 customers and assist customers in completing tax returns. Respond to incoming calls regarding income tax refunds. Explain the disposition of a given refund. Explain the offset process to the 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.

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 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 basis for the assessments. Provide collection breakdown letter with balance and account summary. Explain how to request a waiver of penalty. Input, update/retrieve information from various sources, including SIEBEL (CRM), legacy tax and collection systems.

Duty 3

General Summary:

Percentage: 25

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

Individual tasks related to the duty:

Research the account to locate and apply payments. Explain the adjustments made to an account. Explain basis for an 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. Compiles and prepares various reports. Assists less-experienced representatives, as necessary. The experienced level representative 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 claim.

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 service center environment utilizing knowledge base and case management tools to answer questions and resolving account problems using appropriate customer service techniques. Requires proficiency as a bilingual Spanish/English speaker in order to service Spanish speaking customers. Including 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.

Selective Position Requirement for proficiency as a bilingual Spanish/English speaker in order to service Spanish speaking customers. The current employees meet this requirement and additional employees need to be recruited.

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 individuals' income tax and other revenue tax matters. This positions' primary function is to serve as the primary customer contact in a 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:

High school graduate or equivalent

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.

KNOWLEDGE, SKILLS, AND ABILITIES:

Bilingual in Spanish and English. 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 Customer Service Bureau.

CERTIFICATES, LICENSES, REGISTRATIONS:

None

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

10/12/2012

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