

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

Position Code

1. TREACSR

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) COLLECTION SERVICES BUREAU
4. Civil Service Position Code Description TREASURY CUST SRV REP-E	10. Division Information Processing Division
5. Working Title (What the agency calls the position) CUSTOMER SERVICE REPRESENTATIVE	11. Section CUSTOMER SERVICE OPERATIONS
6. Name and Position Code Description of Direct Supervisor VARIOUS; OFFICE SUPERVISOR-2	12. Unit Customer Information Services Unit (CISU)
7. Name and Position Code Description of Second Level Supervisor VARIOUS; DEPARTMENTAL MANAGER-3	13. Work Location (City and Address)/Hours of Work OPERATIONS CENTER 7285 PARSONS, DIMONDALE, MI / 8:00 AM TO 5:00 PM

14. General Summary of Function/Purpose of Position

This position serves as the primary customer contact in a service center environment of the Collection Services Bureau (CSB) utilizing knowledge base and case management tools to assist customers. This employee interacts with taxpayers/debtors and their authorized representatives via telephone technologies and written correspondence, including handling inquiries from customers and/or contracted private collection partners. In accordance with established contact center standards, this position aids in the resolution of delinquent tax and state agency debts and the overall collection process. This position utilizes collection systems to answer customer inquiries regarding departmental policies, procedures, and some points of law and to update and retrieve account information regarding delinquent tax and state agency debt accounts. Further, this employee processes work queues generated by collection systems.

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 contact center environment, interacts with customers and their authorized representatives via telephone technologies and other contact channels such as eService, to answer questions and provide instruction regarding collection accounts, the collection process, Treasury policies and procedures, and payment. Determines appropriate action on collection accounts in accordance with established standards, guidelines, and procedures.

Individual tasks related to the duty:

- Utilize knowledge base information to verify identity and answer inbound and outbound customer inquiries.
- Interact via telephone technologies (inbound, outbound, etc.) with individuals, their representative, other Treasury entities and State Agency departments regarding accounts.
- Explain standard collections processes including the basis of an assessment, the application of payments, and collection enforcement activities.
- Explain statutory guidelines for offset, corporate officer liability, and successor liability.
- Provide information and instruction to customers regarding issuance and release of liens and/or levies.
- Recommend issuance and release of liens and/or levies.
- Ask additional questions of the caller to ensure an understanding of their inquiry.
- Respond to standard questions with options a debtor may have on any given issue.
- Respond to questions regarding income tax refunds and the offset process, explaining the disposition and the legal basis for the offset of refund.
- Initiate standard correspondence.
- Initiate standard installment agreements.
- Identify and recommend financial adjustments to accounts within established guidelines.
- Review, input, update/retrieve account information using Treasury systems.
- Escalate non-standard inquiries and/or complex accounts to senior workers and/or supervisors.

Duty 2

General Summary:

Percentage: 30

In a contact center environment, interacts with customers and their authorized representatives by reviewing correspondence and responding to inquiries regarding collection accounts. Determines appropriate action on accounts in accordance with established standards, guidelines and procedures. Acts as liaison between the customer, their authorized representative, and other internal partners to process and respond to priority correspondence. Responses may include various collection activities such as but not limited to: setting up and monitoring automated payments, maintaining and reconciling collection account activity, processing work queues, monitoring levy responses, and monitoring installment agreements for default activity, etc.

Individual tasks related to the duty:

- Utilize knowledge base information and Treasury systems to review correspondence work queue and respond appropriately to standard written inquiries.
- Employ established policies and procedures to determine and recommend appropriate financial adjustment(s) to accounts.
- Initiate standard letters.
- Triage correspondence for expedited processing.
- Process and respond to priority correspondence.
- Communicate with employers and banks via fax or telephone.
- Communicate with taxpayers and authorized representatives, using a variety of channels, as a follow up to correspondence received.
- Process mail returned to CISU as undelivered.
- Obtain/confirm appropriate contact information.
- Escalate non-standard inquiries and/or complex accounts to senior workers and/or supervisors.

Duty 3

General Summary:

Percentage: 5

Reviews accounts for collectability and recommends write-off or other non-collectible action according to established standards, policies, and procedures.

Individual tasks related to the duty:

- Review multiple Treasury systems for account information.
- Input, update/retrieve information from various systems to update account with action taken.
- Recommend write-off or other non-collectible action.
- Initiate standard letters using Treasury systems.

Duty 4

General Summary:

Percentage: 5

Other related duties as assigned.

Individual tasks related to the duty:

- Participate in training, meetings, and quality assurance activities as assigned.
- Assist less experienced representatives as necessary.

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

Standard activities and responses to taxpayers or their representatives that result in setting up installment agreements or payment plans within established guidelines. Standard hardship and other issues that result in requests for non-collectible or write-off status. Standard lien/levy release or filing issues.

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

Non-standard disclosure issues.

Non-standard installment agreements.

Non-standard hardship or other issues that result in requests for non-collectible or write-off status.

Non-standard lien, levy release or filing issues.

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.

Must work at a desk for long periods of time with extensive use of the telephone and personal computers. Standard office equipment is used and occasional transport of containers weighing up to 20 pounds. The employee may be subject to stressful customer contact situations over the telephone.

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):

- | | |
|---|--|
| ☐ 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. |

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 Treasury, this position interacts with customers and their authorized representatives via the telephone technologies and written correspondence. In accordance with established contact center standards, this position aids in the resolution of delinquent tax and state agency debts. This position utilizes knowledge base information from the Treasury systems to answer customer inquiries regarding departmental policies, procedures, and some points of law. Further, this employee retrieves and updates account information utilizing Treasury systems.

The essential duties include all requirements identified in Section 15 of this position description.

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

PD updated to reflect a removed bullet from duty 4 "Assist less experienced representatives as necessary."

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

The Collection Services Bureau, Customer Information Services Unit (CISU) is responsible for the collection of past due taxes and state agency debts. The function of the work unit is to provide information and assist customers in the resolution of accounts via the telephone and written correspondence. This position's main function is to serve as the primary customer contact in a contact center environment utilizing knowledge base and case management tools to resolve debtor inquiries related to the collection process.

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

EDUCATION:

High School Diploma or GED.

EXPERIENCE:

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:

- Excellent verbal and written communication skills.
- Knowledge of proper customer service practices.
- Working knowledge of various computer software applications, such as Microsoft Office.
- Ability to multitask while handling a high volume of customer contacts daily via the telephone and in writing.
- Ability to effectively utilize a variety of applications to research and compare account information.
- Ability to handle stressful customer contact situations over the telephone to include but not limited to de-escalation and successful resolution.
- Ability to explain various laws rules, regulations and procedures.
- Employee must develop a good understanding of Taxpayer Bill of Rights and Collection policies and procedures.

**CERTIFICATES, LICENSES,
REGISTRATIONS:**

FTIFNPRINT sub-class code. 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