

**State of Michigan
Civil Service Commission**

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

Position Code

1. TREACSRAC21R

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-A	10. Division Business Taxpayer Services
5. Working Title (What the agency calls the position) Senior Customer Service Representative	11. Section
6. Name and Position Code Description of Direct Supervisor OFFICE SUPERVISOR-2	12. Unit
7. Name and Position Code Description of Second Level Supervisor DEPARTMENTAL SUPERVISOR-3	13. Work Location (City and Address)/Hours of Work Operations Center, Dimondale, MI Monday-Friday, 8:00AM-5:00PM

14. General Summary of Function/Purpose of Position

This position serves as the primary contact to the public in relation to business taxes in a service center environment. The employee will utilize knowledge and case management tools to handle complex assignments that contribute to meeting the goals of the Business Tax division and the Department of Treasury. The individual uses appropriate customer service techniques while managing a high volume of inquiries through various channels. Employees are expected to provide instruction to taxpayers regarding policies, procedures and regulations as it pertains to the division. The individual will answer tax questions, explain billing notices, resolve work related problems within established guidelines, respond verbally and in writing to inquiries received from the general public and/or other department personnel. Employee can explain the Business Tax Acts in addition to procedures involved in preparation and correction of a return.

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: 30

Responding to Taxpayer inquiries.

Individual tasks related to the duty:

- Responding to taxpayer inquiries in a service center environment.
- Interacts with customers via telephone to answer complex calls regarding Business Tax filing requirements, and penalty and interest computations.
- Responds to detailed and technical inquiries concerning collection accounts, assessed liabilities, offsets and payments.
- Process corrected Business Tax. Explains changes and adjustments.
- Assist taxpayers to resolve issues involving multiple assessments tax periods and tax types to returns files and/or assessments or multiple misapplied payments for an account.
- Calls from Collections, filed offices to resolve account problems that have been previously reviewed by staff and need additional review to resolve.
- Calls escalated from less experience clerks.
- Assisting taxpayers to resolve issues when collection action has been initiated on liens and levies.
- Interprets various policies/procedures to determine necessary resolution.

Duty 2

General Summary:

Percentage: 30

Processes complex correspondence received by the division.

Individual tasks related to the duty:

- Senior clerks are responsible for reviewing and interpreting complex correspondence and inquires, including correspondence directed to the administrator or manager.
- Senior clerks use independent judgment in responding to correspondence from taxpayers, their representative, attorneys, and tax preparers.
- Provide complex detailed explanations to the taxpayers and their representatives.
- The types of correspondence they review and respond to includes examples below.
- The responses to inquiries can be written and may include the department's policies and procedures.
- The senior clerk determines what action is needed to resolve issues related to sales, use, and withholding taxes.
- Requests for detailed explanations of changes to tax returns, such as the Department's requirements in issuing interest or explaining what items are included or not included in the tax base.
- Requests for detailed explanations to the taxpayers request for a hearing, including why an adjustment was made, resulting in an assessment, denial of refund or credit forward reduction, including the penalty and interest charge that may have incurred.
- Corrects or cancels assessments when necessary based on additional taxpayer information. Searches for and corrects payments that may have been applied to the up to the wrong account or tax type. Adjusts previous actions based on additional information, up to and including recommendations related to waiver of penalties. Making decision for penalty waiver based on reasonable cause guidelines and the Taxpayer Bill of Right.
- Explaining the details in the computation of underpayment of estimates, late penalty and interest, extension penalty and interest and the department requirements for extension and estimated payments.
- Reviews taxpayer's request for a waiver of penalty and interest, submits recommendations to management for approval.

Duty 3**General Summary:****Percentage: 25**

Handles complex tax returns.

Individual tasks related to the duty:

- The senior clerk understands and has the knowledge to process complex tax returns, including returns with multiple schedules.
- The clerk must be knowledgeable in tolerances and overrides for returns that are not to be computer audited, including accounts that require detailed research before the account can be completed.
- Documents all contacts and outcomes within systems.
- 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 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: 15**

Special Projects.

Individual tasks related to the duty:

- The senior clerk works with management to develop parameters and procedures for completing a given project.
- Answer questions from other division/units if changes in procedures are involved in the completion of the project work.
- Provide direction to staff regarding how project work is to be executed, possible modifying plans based on staff input.
- Senior clerks advise the assistant administrator or second line supervisor of progress and/or problems associated with the project.
- Retrieves returns and correspondence from microfilm.
- Alerts supervisor when there is confusion or absence of information in the knowledge base to answer questions.
- Processes interdepartmental adjustments.

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 procedures, job outlines, memos and instructions both verbal and written in processing correspondence, telephone inquiries, Business Tax returns, and assessments. Employee can make decisions on whether or not to assess a discretionary penalty and whether or not to waive a penalty charge. The individual is responsible for knowing and applying all information contained in related charts, decision tables, policies, form instructions, and job outlines. Understanding the Business Tax and Revenue Acts.

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

Decisions related to returns resulting in refunds/credit forwards & tax due, the approval of freeform letters, the approval of assessments and penalty waivers, issues that are not covered in written instructions and guidelines and/or the disclosure of information in unusual or questionable situations.

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. This job requires extensive use of State of Michigan issued computer. The individual must answer telephone calls from taxpayers and preparers daily. 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 resolve account problems using appropriate customer service techniques. Ability to perform the most complex and difficult assignments. Provide assistance and training to new staff and lower level Treasury Customer Service Representatives, supervisors and others. Participate in special projects related to systems.

Includes all requirements listed in section 18 of this position description.

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

Essential duties have not changed. Updated to composite PD and removed specific system language.

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 provide information and answers to taxpayer inquiries regarding Business taxes and other revenue matters. This position serves as the primary contact in a service center environment utilizing knowledge base and case management tools to responds to inquiries, processes returns and issue assessments. This position handles the most complex and/or sensitive inquiries.

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:

Treasury Customer Service Representative 9

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

KNOWLEDGE, SKILLS, AND ABILITIES:

The employee must be able to communicate effectively with the public, analyze situations dealing with tax related matters and resolve them. The employee must have a thorough knowledge of the Revenue/Business Tax Acts, procedures and policies of the department and resource materials available.

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