

**State of Michigan
Civil Service Commission**

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

Position Code

1. TREACSREA04R

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 Business Taxpayer Services Division
5. Working Title (What the agency calls the position) 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 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 they pertain 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:

- Responds to routine taxpayer inquiries in a high volume call center environment involving one tax type.
- Explains information relating to Business Taxes refunds, adjustments, copy of forms or returns requests, filing requirements, payment location/ verification, tax liabilities, account breakdowns, mailing addresses, line-by-line instructions, self-service website, collections assessments, etc.
- Processes corrected returns.
- Handles inquiries such as "Where is my refund" and requests for copies of forms or returns.
- Conducts research utilizing a knowledge base to account specific questions while on the telephone with the taxpayer or their representative.
- Reviews specific tax returns including prior year returns/filings, taxpayer filing circumstances, special situations, including liabilities, estimated payments, and current year data. Research needed to respond to issues also includes Collections procedures, policies, review of past collection actions on a given account.
- Uses all systems at a proficient level in order to process returns.
- Examines completed returns and review figures for accuracy.
- Handles initial contacts with callers to answer questions concerning tax rates, assessments, tax liability, account breakdowns and resending of tax returns.
- Handles calls that involve taking messages or transfers to senior TCSRs or supervisors.
- Explains the line-by-line instructions and how to access the self-serve website.
- Refers complex inquiries concerning multiple assessments, multiple tax types, multiple accounts, and multiple credits to a senior worker.

Duty 2

General Summary:

Percentage: 30

Processes correspondence received by the division.

Individual tasks related to the duty:

- An experienced level clerk reviews routine correspondence received in accordance with established policies and procedures.
- Resolves issues such as changes to tax returns including penalty and interest, department filing requirements, refund inquiries, and assessment explanation.
- Handles returns filed on wrong forms that would require sending a form letter to the taxpayer, stating the errors made and correct information needs.
- Addresses inquiries such as "Why am I assessed?" or "When will I receive my refund?"
- Handles standardized letters with canned messages.
- Refers complex correspondence, inquiries with multiple issues, and responses requiring free-form letter writing to a senior worker to complete.

Duty 3

General Summary:

Percentage: 25

Handles business tax returns.

Individual tasks related to the duty:

- An experienced level clerk reviews the returns in accordance with established policies and procedures.
- Reviews returns that are limited in the types of income adjustments a taxpayer may claim including one-page forms with limited entries and adjustments.
- Refers complex returns with multiple schedules and issues regarding attribution to a senior worker.

Duty 4

General Summary:

Percentage: 15

Special Projects.

Individual tasks related to the duty:

- Participates in projects, completing the work required based on the directions provided by the senior clerk.
- Provides input to the project leader based on results and execution of the work.
- Shows employees how to perform an assignment, however is not expected to review or direct the work of another staff member.
- Participates in special projects related to the systems and procedures of the work area..
- Alerts supervisor when there is confusion or absence of information in the knowledge base to answer particular questions.
- Initiates status reports to supervisor when delays occur in responding.

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. Decisions include whether the telephone inquiry should be escalated, whether taxpayers have provided enough information to complete a registration application or tax clearance, justify a correction to the account and whether the appropriate penalty and interest were charged. 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 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. 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):

- | | |
|---|--|
| ☐ 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 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.

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 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 resolve taxpayer's inquiries concerning all business taxes, business tax registration, tax clearance certificate, 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:

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:

The employee must be able to effectively communicate with the public both verbally and in writing, 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