State of Michigan
Civil Service Commission

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

Position Code
1.

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)** CITY INCOME TAX BUREAU
4. Civil Service Position Code Description TREASURY CUST SRV REP-E	**10. Division** CUSTOMER SERVICES & PROCESSING
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, 8:00 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 utilizing knowledge base and case management tools to assist customers with issues related to City Income Tax Bureau. These functions include performing tax processing activities, reviewing error conditions on returns identified by the processing system including city, state and federal tax returns and communicating with the public. Channels of communication include mail, telephone, email, and electronic channels. The position will address tax questions, explain billings, assist in the preparation of city income tax returns, and explain the procedures involved, department policies, procedures, and points of law. This will be accomplished through utilization of an integrated knowledge base and a customer relationship management system. Performs all work in accordance with established quality assurance standards. Skills required include mathematical skills, decision making skills, organizational skills and strong verbal and written communication skills.

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:** **65**

In a multi-channel service contact center environment, interacts with customers via telephone, CRM Web, Email, and IVR to answer questions and provide assistance understanding forms and adjustments to accounts. Process and respond to correspondence received from taxpayers.

Individual tasks related to the duty:

- Utilize knowledge base information to answer customer inquiries.
- Research reference materials available to explain tax law changes, city income tax forms and instructions as well as procedure manuals and other materials, to find answers to questions. Use knowledge base information to answer customer inquiries.
- 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 tax laws, rules or regulations to customers and assist them in completing city tax returns.
- Respond to incoming calls regarding tax refunds.
- Explain the offset process to the taxpayer and the legal basis for the offset of a refund.
- Explain statutory guidelines for prior year refunds.
- Process imaged correspondence responses from taxpayers using appropriate systems and work procedures.
- Provide information to customer questions regarding billings.
- Use 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 the 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 systems.

Duty 2

General Summary: **Percentage:** **20**

Examines returns, which have been identified through computer audit as containing errors or discrepancies. Issues assessments in accordance with guidelines and procedures on tax due returns. Explains, in writing, any adjustments made in processing to returns and refunds.

Individual tasks related to the duty:

- Reviews files and related computer screens for tax returns.
- Determines and makes appropriate adjustments, corrections or disallowances.
- Determines if override of computer security system will be needed and when necessary, assign appropriate code.
- Codes the return for computer generated letter of explanation or inquiry and prepares correspondence explaining discrepancies, adjustments and any further action or appeal which the taxpayer has a right to pursue.
- Refers returns to processing or to senior CSR review.

Duty 3

General Summary: **Percentage:** **10**

Resolve taxpayer issues. Respond to general inquires 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 adjustment 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.
- Staff written responses must comply with Department’s policy on disclosure.
- Inquiries may originate with taxpayers, or their representative.
- Responses are usually standard form letters and canned messages.

Duty 4

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

Other related duties as assigned.

Individual tasks related to the duty:

- Compiles and prepares various reports.
- Alerts senior worker, supervisor or technician when there is unclear or absence of information in the knowledge base to answer questions.
- Assists less-experience representatives, as necessary.
- The experienced level person 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.

The individual is responsible for knowing and applying, information contained in related charts, decision tables, policies, form instructions, and job outlines, and understanding applicable laws and regulations. Letters may be sent to taxpayers requesting additional information.

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

Decisions related to the approval of assessments and penalty waivers. Decisions related to issues that are not covered in written instructions and guidelines. Decisions related to the 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.

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?

This position serves as the primary customer contact in a service center environment utilizing knowledge base and case management tools to assist customers with issues related to City Income Tax Bureau. These functions include performing tax processing activities, reviewing error conditions on returns identified by the processing system including city, state and federal tax returns and communicating with the public. Channels of communication include mail, telephone, email, and electronic channels. The position will address tax questions, explain billings, assist in the preparation of city income tax returns, and explain the procedures involved, department policies, procedures, and points of law. This will be accomplished through utilization of an integrated knowledge base and a customer relationship management system. Performs all work in accordance with established quality assurance standards. Skills required include mathematical skills, decision making skills, organizational skills and strong verbal and written communication skills. Also 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.

This position has been updated to more accurately reflect the work and responsibilities of the position. The specific tax types were removed from the PD since TCSRs will be cross trained and they can handle calls for both Individual and Business city taxes. We also made a change to percentage of times on phones.

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

The City Income Tax Bureau, Customer Services & Processing Division is responsible for the timely processing of city tax returns and customer service support for city tax returns. The Customer Service Representative position is the first line of contact for city taxpayers and also processes the returns.

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:

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 City Income Tax Bureau.

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