State of Michigan
Civil Service Commission

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

Position Code
1. TREACSRAC14R

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** Special Taxes Division
5. Working Title (What the agency calls the position) Treasury Customer Service Representative-A	**11. Section** Miscellaneous Tax/IFTA/Tobacco/Motor Fuel
6. Name and Position Code Description of Direct Supervisor BURLINGAME, MAXIMUS; OFFICE SUPERVISOR	**12. Unit**
7. Name and Position Code Description of Second Level Supervisor SCHMITZ, NATALIE; DEPARTMENTAL SUPERVISOR	**13. Work Location (City and Address)/Hours of Work** Operations Center, Dimondale, MI Monday-Friday 8:00am to 5:00pm

14. General Summary of Function/Purpose of Position

This position serves as the primary contact for taxpayers, in a service center environment, providing information and assistance related to the taxes and fees administered by the Special Taxes Division. Employees utilize a knowledge base and case management tools to handle complex assignments that contribute to the goals and mission of the Special Taxes Division and the Department of Treasury. The individual employs appropriate customer service techniques while managing inquiries received by phone and electronic communication channels. Employees provide instruction to taxpayers regarding policies, procedures, and points of law that apply to the taxes and fees administered by the division. The individual answers questions regarding the taxes and fees collected, explains return or form adjustments, reviews billing notices, and responds verbally or in writing to inquiries received from the public or department personnel. Employee references and explains statutes governing the administration of taxes and fees served by Special Taxes, and explains procedures involved in preparing and correcting returns and forms.

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: 55**

Responds to taxpayer inquiries in a service center environment. Interacts with customers via telephone to answer complex calls regarding filing requirements, penalty and interest computations, unique filing circumstances, and other complex questions. Responds to detailed and technical inquiries regarding assessments, filing errors, refund offsets and payment issues. Senior level CSR explains complex return adjustments and processes corrected returns.

Individual tasks related to the duty:

- Uses appropriate customer service techniques while providing information.
- Respond to inquiries related to refund status or requests for returns, forms, or other documents.
- Asks additional questions of caller to seek clarification and provide appropriate service.
- Research issues, using tools and resources, to provide account specific answers to taxpayers or their authorized representative.
- Review tax returns, outstanding liabilities, and payments, while considering unique filing situations, to assist taxpayers. Additional research needed to respond to customer inquiries include a review of assessments and an understanding of collection policies related to delinquent accounts.
- Proficient with Treasury systems required while processing returns, correspondence, and conducting research of customer issues.
- Examine completed returns based on area business rules.
- Complex inquiries received by telephone may require detailed note keeping and follow up with taxpayer. Inquiries may be forwarded to senior level CSR based on determination of supervisor.
- Provide self-service options to taxpayers for ongoing management of account.
- Assist taxpayers to resolve complex issues, such as multiple assessments, issues spanning more than one tax period, or multiple misapplied payments for an account.
- Identify ways and instruct callers on the course of action needed to resolve assessments or ongoing compliance issues.
- Assist with complex calls related to compliance issues, collection activities, or unique legal issues.
- Resolve issues referred from less experienced CSRs.
- Interpret various policies/procedures to determine appropriate resolution.

Duty 2

General Summary: **Percentage: 20**

Review and interpret complex correspondence and inquires. Senior CSRs use independent judgment in responding to correspondence from taxpayers, their representative, attorneys, and tax preparers. They provide complex detailed explanations to the taxpayers and their representatives. This includes correspondence that is complex in nature, requires reference of statute, and/or the department's application of specific policy provisions. The senior level CSR determines appropriate courses of action to resolve issues for taxes administered by the Special Taxes Division.

Individual tasks related to the duty:

- Respond to inquiries related to filing returns/forms, refund questions, and submission of license applications.
- Identify errors on returns or forms submitted to the department and processes for resolution.
- Respond to customer inquiries which are straightforward in nature and do not require development of novel explanations or in-depth statutory citation.
- Interacts with customers via telephone or in writing to answer questions regarding adjustments made.
- Utilizes knowledge base information to answer customer inquiries.
- Request detailed explanations related to return/form filing formats and requirements, detailed explanations of refund calculations, or explanation of department practice and application of statute, including reasons for denial.
- Respond to requests for hearings, rationale for adjustment of a return or form, and/or license denial/revocation details.
- Communication which includes determinations of need to correct or cancel assessment based on additional information received, including recommendation to waive penalty based on departmental guidelines.
- Provide appropriate and detailed information in response to tax clearance requests.
- Review and process correspondence in the form of tax settlements or agreements from appeals processes, including information from the tax tribunal or court of claims.

Duty 3

General Summary: **Percentage: 20**

Reviews the returns, return errors, and/or license applications in accordance with established policies and procedures. This includes returns/forms which are regularly received by the department, containing errors which are deemed familiar in nature and for which policy/procedure determinations have been established related to resolution. Understands and has the knowledge to process complex returns/forms, complex and nuanced errors, and license applications for novel business practices.

Individual tasks related to the duty:

- Process returns and forms, reviewing documentation and support provided to verify accuracy of information submitted.
- Process returns and forms which may require careful review due to multiple payments or schedules, but for which policy or procedure has been established.
- Examine amended returns and forms for correctness, including correction of previous error in submission.
- Examine complex amended returns or forms, including consideration of possible non-compliance matters.
- Conduct in-depth review of complex returns or forms, including review of statute or departmental procedure to determine appropriate course of action.
- Determine if/when returns or forms should be held from processing due to pending litigation.
- Review or provide assistance with reviewing license applications which are complex or for which compliance issues have been identified.

Duty 4

General Summary: **Percentage: 5**

Other duties and special projects as assigned. Work with leadership to develop parameters and procedures for completing projects and may be required to answer questions from other work areas if changes in procedures are involved in the completion of the work, especially if these changes affect other work areas.

Individual tasks related to the duty:

- Works with leadership to develop parameters and procedures for completing projects and answers questions from other work areas if changes in procedures are involved in the completion of work.
- Provides direction to staff regarding processes and expectations for completion of projects and communications changes to the project or expected outcomes based on communication received from leadership or staff input.
- Provide updates to leadership related to progress and/or issues related to ongoing projects.
- Other duties and special projects as assigned.

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

Handle complicated, sensitive and unique taxpayer issues.

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

Issues of first impression that may have impact on the public or staff. Analysis of new legislation and any deviation from the Department's established policies and procedures.

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.

Physical effort and environmental conditions are similar to those in a normal business office operation; air temperature and lighting. These include sitting and utilizing a personal computer for long periods of time. High exposure to advanced technology. The individual may also have to occasionally 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 contact 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.

No changes.

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

The Special Taxes Division is responsible for the timely and quality processing of Special Taxes, responding to customers, and overall operational performance measurement. This position's primary function is to serve as the primary customer contact in a multi-channel service center environment utilizing knowledge base and case management tools to resolve taxpayer 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:

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 Tax Administration Services Bureau.

CERTIFICATES, LICENSES, REGISTRATIONS:

FTINPRINT sub-class code. This 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.

N/A

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**