State of Michigan
Civil Service Commission

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

Position Code
1. DPTLTCHAL16R

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 DEPARTMENTAL TECHNICIAN-A	**10. Division** Individual Income Tax
5. Working Title (What the agency calls the position) IIT Departmental Technician 10	**11. Section**
6. Name and Position Code Description of Direct Supervisor CORKINS, ZACHARY & MULLIGAN, JASON; DEPARTMENTAL MANAGER	**12. Unit**
7. Name and Position Code Description of Second Level Supervisor MURRAY, KIMBERLY; STATE ADMINISTRATIVE MANAGER	**13. Work Location (City and Address)/Hours of Work** 7285 Parsons Dr, Dimondale MI 48821 Monday-Friday, 8am-5pm

14. General Summary of Function/Purpose of Position

The purpose of this position is to conduct the specified activities which must be carried out in order to meet Division and Department goals and objectives for the Individual Income Tax Section. Must be proficient in individual income taxes and able to resolve complex account issues.

This position's primary functions include:
1) Serving as a technical resource for team members and investigation of escalated customer complaints.
2) Plan, develop and conduct training. Provide coaching and feedback to staff.
3) Recommend business process improvements and provide system testing support.
4) Perform system queries and provide results.
5) Participate on special project teams as assigned by supervisor.

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: 40**

Serve as a Technical Resource for Team Members & Investigate Customer Complaints - Examine complicated returns, which have been identified through computer audit as containing errors or discrepancies. Examine returns that are not able to be computer audited. Examine information provided by the Internal Revenue Service, other taxing authorities, administration or employers. Answers inquiries and explains statutes, rules, regulations and policies and procedures to taxpayers or their representative to assist in taxpayer compliance. Issue assessments in accordance with Department's guidelines and procedures. Comply with Department's policy on disclosure.

Individual tasks related to the duty:

- Handles complex individual income tax filing issues that require interpretation of law or policy that is not clearly outlined in standard job procedures. Provides an additional level of research and interpretation of statutes, policy and an understanding of the impacts of pending legislation and recent changes in law.
- Responsible to investigate highly contentious complaints received by Treasury executive office and determine the appropriate resolution. The resolution may include changes to overall process and procedure.
- Serve as the intermediary between processing staff and various areas of Treasury when dealing with technical issues.
- Responsible for reviewing returns and identifying ID theft, tax fraud and non-compliance matters. These issues are often complex in nature and require an additional level of research and interpretation of statutes, agreements, policy and understanding the impacts of pending legislation and recent changes in the law.
- Work with the staff in the Individual Income Taxes Division to develop a holistic understanding of the tax laws, operational procedures, and system functions and how they all interact.

Duty 2

General Summary: **Percentage: 25**

Plan, develop and conduct training - Conduct programs for staff development related to, but not limited to, implementation of new work processes, systems and/or instructions.

Individual tasks related to the duty:

- Work closely with the analyst team and with a broad spectrum of division staff to plan, develop and conduct training programs for new staff as well as ongoing staff development related to, but not limited to, implementation of new work processes, systems and/ or instructions.
- Responsible for the development of new training content by working directly with DTMB and the unique tax processing system vendors.
- Develop procedures and guidelines in such a way to promote individual income tax processing uniformity among individual income tax staff.
- Work closely with supervisors and analysts to identify issues for training and remedies for system functionality that are crucial to completing the work of the unit and develop training and reference materials for new processes and procedures.
- Identify new training needs by interpreting Individual Income tax existing and new statutes to educate the public and staff.

Duty 3

General Summary: **Percentage: 20**

Recommend Business Process Improvements and System Testing Support – Provide support to the Individual Income Tax (IIT); including system testing. Provide system support to implement year end changes and correct production issues through the year.

Individual tasks related to the duty:

- The senior level technician participates in developing scripts/scenarios for system testing and validates the results of system testing.
- Responsible for testing of new technology initiatives and works directly with staff in ITBID, DTMB and the unique tax processing system vendors.
- Serve in a triage role for staff to channel system issues to. Research and forward documented analysis to system analysts for remedy and resolution.
- Identify and recommend changes to processes, procedures, and/or general operations including the Department's website, and changes in processing and customer responses.
- Initiate new work processes for the effective use of the system relating to the unique tax processing system.
- Research and suggest system enhancements to provide increased customer Service to taxpayers.
- Research and identify feasible technology initiatives and recommend changes to current business processes and systems.
- Serve as a lead during forms development and monitor the impact of tax form changes on the various systems.
- Design, maintain, and facilitate the distribution of new reference materials that are used by staff on the Bureau's internal web pages (Treasipedia) when changes occur to tax lawsRecommend changes to procedures, policies and protocols, including changes to computer systems.

Duty 4

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

Performs queries and summarize results - Create and run Ad Hoc and routine queries to facilitate work production, metrics gathering and in response to requests for data from the individual income tax processing system. Review data and distribute reports.

Individual tasks related to the duty:

- Responsible for creating and performing complex queries using tools within the unique tax processing systems, legacy and non-legacy database query programs. These queries are large in volume and include multiple tax years, returns errors, and work items from different channels (e-file, paper returns, and correspondence).
- Create complex ad hoc queries and summarize the results based on management requirements, using multiple systems and programs to generate worklist for staff to work.
- A senior level staff recommends staff assignments based on a review of the system queries.
- Responsible for summarizing complex results in a variety of formats. These results relate to accounts for high dollar, high profile, highly contentious taxpayer accounts that have multiple sources of business income that require in depth analysis of Federal tax information. They must include all of the filing information and contain a delicate balance of information obtained from State tax information and Federal tax information which all must be summarized into a format that can be understood by Departmental personnel, attorneys, legislative liaisons and potentially used for litigation purposes.

Duty 5

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

Miscellaneous duties as assigned.

Individual tasks related to the duty:

- Participate in workgroups or on teams as assigned by supervisor.
- Participate on teams striving to improve customer service experience for Michigan taxpayers.
- Provide direction to staff assigned to a special project.
- Perform essential functions and non-essential functions as required by management.

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

Decisions related to the format and content of documents that will affect Treasury staff. Decisions related to proper data elements to include when creating Ad Hoc queries and reports.

Responsible for applying procedures in processing income tax returns selected for review. Returns processed without supervisory review and refunds under a specified amount are issued. Responsible for determining proper communication methods and content to taxpayers.

Serve as a technical resource for staff regarding income tax processing. Investigate inquiries received by Taxpayer Advocate and Treasury Executive office and determine resolution.

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

Decisions that affect the policies and procedures of the Division and/or Department. Decisions related to unusual situations that do not have guidelines in place. Decisions regarding penalty waivers. Refunds over a specified amount.

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 may work at a desk for long periods of time. The job requires extensive use of a personal computer. There may be periods of competing priority assignments with critical deadlines.

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?

Ability to perform the Departmental Technician duties as described to support the Individual Income Tax. Ability to communicate effectively both verbally and in writing. Provide support to the income tax processing system. This support includes the ability to understand the income tax processing system and assist with system testing and trouble shooting. Ability to participate in project teams and lead work groups associated with those projects. Ability to review/correct income tax returns selected for review and research and respond to escalated inquiries from Taxpayer Advocate and Executive Office. Assist and provide support to the Individual Income Tax

Includes all requirements listed in Section 18 of the PD.

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

New position.

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

Annually, the Individual Income Tax Division processes over 5,000,000 individual income tax returns, associated schedules, and credit forms, and reviews approximately 350,000 returns that cannot be processed as they are entered into the computer. This position performs duties related to the processing system and testing of the system. This position also assists on special project teams to improve processes and enhance customer service. This position also reviews/corrects returns identified for manual review and communicates as appropriate with the taxpayer, provides guidance for other IIT staff and assists with special projects.

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:

Departmental Technician 10
Two years of experience as a supervisor of administrative support activities equivalent to the 9-level in state service.

OR

Two years of experience performing administrative support activities equivalent to the 9-level in state service.

OR

Three years of experience as a technician or paraprofessional, including one year of experience equivalent to the experienced level in state service.

Alternate Education and Experience

Departmental Technician 10
Possession of a Bachelor's degree and one year of professional experience may be substituted for the experience requirement.

KNOWLEDGE, SKILLS, AND ABILITIES:

The individual should possess the abilities and skills noted below:

- Knowledge of individual income tax and the ability to effectively utilize the individual income tax processing system is highly necessary.
- The ability to evaluate a variety of data from the standpoint of systems and procedures.
- Possess good analytical and problem-solving skills.
- The ability to organize, evaluate and present information effectively.
- The ability to communicate effectively with others both verbally and in writing.
- The ability to learn and utilize computer processes.
- The ability to interpret laws, rules and regulations related to their work.
- Possess good interpersonal skills, be self-motivated, and team oriented.
- The ability to research specific individual income tax situations and resolve them.
- The ability to effectively utilize software.
- Must be dependable, reliable, and demonstrate the ability to follow through on assignments in a timely manner.

CERTIFICATES, LICENSES, REGISTRATIONS:

This position has a FTINPRINT sub-class code. The sub-class code indicates 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**