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)** Tax Administration Services Bureau
4. Civil Service Position Code Description DEPARTMENTAL TECHNICIAN-E	**10. Division** Individual Income Tax
5. Working Title (What the agency calls the position) IIT Departmental Technician 7-E9	**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:

- Reviews files, multiple forms and schedules, involved tax situations, complicated federal returns, related computer screens for the most complicated returns, and taxpayer correspondence.
- Determines and makes appropriate adjustments, corrections or disallowances.
- Determines need for and prepares other adjusting entries.
- Determines if override of computer system will be needed and, when necessary, assigns 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.
- Verify that the examined return is correct for processing and submits to system for further processing.
- Review the data with Michigan tax files and records.
- Identify discrepancies and initiate appropriate action.
- Calculate tax due, interest and penalties. Penalties are those set by law and/or policy, as well as those which are to be applied at the discretion of the employee.
- Adjust previous actions based on additional information, up to and including recommendations of waiver of the penalties.
- Responds to Inquiries verbally or in writing.
- Prepare assessments for approval.
- Assess multiple penalty types with various due dates when necessary.
- Confirm letter of inquiry has been issued when required by Taxpayer Bill of Rights.
- Correct or cancel assessments when necessary.
- Enters assessment or correction on STAR after receiving approval.
- Adjusts previous actions based on additional information, up to and including recommendations of penalty waivers.

Duty 2

General Summary: **Percentage: 25**

Plan, Develop and Conduct Training - As part of the Peer Review process, provides and assists with training to other IIT staff. Keeping appropriate staff informed of changes to tax law, policies and procedures.

Individual tasks related to the duty:

- Review work of other staff, including entry, intermediate and experienced level calculation assistants as part of a peer review process.
- Provide coaching and feedback to facilitate learning opportunities for entry, intermediate, and experienced level calculation assistants.
- Review procedures and instructions; recommend revisions and updates to the training group.
- Respond to inquiries from peers and provide guidance as needed.
- Identifies training needs.

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:

- Assist in development of system testing criteria; participating in a core group of income tax staff in the preparation of tax returns (including credit claims) for testing purposes.
- Assist in review of test data to determine if the IIT processing system is working properly.
- Assist with research and resolution of issues identified by Taxpayer Advocate, Treasury Executive Office, and at supervisor request; including contacting taxpayers via telephone when appropriate.
- Compile information in response to requests from other State agencies such as the Office of Auditor General.
- Answer inquiries related to income tax system processes.
- Attend meetings related to improving processes.
- Log system and scanning issues in tracking spreadsheet and ensure appropriate staff are aware of issues.
- Recommend changes to procedures, policies and protocols, including changes to computer systems.
- Assist with update and review of internal and external forms related to individual income tax.
- Maintain and update information on IIT Treasipedia SharePoint site.
- Participate on teams for special projects that impact multiple bureaus in Treasury.

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:

- Create and run Ad Hoc queries and generate corresponding reports.
- Run queries for weekly production reporting and approval queue backlog.
- Run queries for return and correspondence work lists.
- Run monthly query for communication to farmland filers.
- Run monthly query for monitoring and follow up of specific accounts.
- Create and run Ad Hoc queries and reports using URSA and BI-Query in response to requests from the Manager and Assistant Administrator.
- Run queries to generate IIT Return Processing monthly scorecards for individual team members, units, and section; and distribute as appropriate. Present scorecard information to new Return Processing team members.
- Attend meetings and participate in discussions related to query results and report data.

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 7
One year of experience performing administrative support activities equivalent to the 7-level in state service.

Departmental Technician 8
One year of experience performing administrative support activities equivalent to the 8-level in state service.

OR

One year of experience as a technician or paraprofessional equivalent to the entry level in state service.

Departmental Technician E9
One year of experience as a supervisor of administrative support activities equivalent to the 9-level in state service.

OR

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

OR

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

Alternate Education and Experience

Departmental Technician 7
Completion of two years of college (60 semester or 90 term credits) may be substituted for the experience requirement.

Departmental Technician 8
Possession of a Bachelor's degree may be substituted for the experience requirement.

Departmental Technician E9
Possession of a Bachelor's degree and one year of job-related 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**