

**State of Michigan
Civil Service Commission**

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

Position Code

1. DPTLTCHE

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 Departmental Technician-E	10. Division COMPLIANCE & COLLECTIONS
5. Working Title (What the agency calls the position) DEPARTMENTAL TECHNICIAN-E	11. Section
6. Name and Position Code Description of Direct Supervisor JOHNSON, PHILIP; DEPARTMENTAL MANAGER	12. Unit
7. Name and Position Code Description of Second Level Supervisor JUNE, CAROLINE; STATE DIVISION ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 7285 PARSONS RD, DIMONDALE, MI 48821 Monday - Friday, 8:00 AM to 5:00 PM

14. General Summary of Function/Purpose of Position

This position functions as a Departmental Technician within the Compliance and Collections Division of the City Income Tax Bureau (CITB) and provides specialized technical support for the administration of Treasury-administered city income taxes. The position reviews and analyzes tax returns and taxpayer accounts to determine compliance with applicable tax laws, statutes, policies, and procedures; processes taxpayer correspondence and account adjustments; and identifies complex or noncompliant matters requiring additional review or referral.

The position also provides technical and operational support for city collections activities, taxpayer hearings, tax clearance administration, and resolution of complex taxpayer account issues. The technician conducts research, analyzes account and compliance data, identifies trends and potential fraud or compliance concerns, and recommends improvements to procedures and compliance initiatives. The position collaborates with CITB staff, other Treasury business areas, participating cities, and external stakeholders to resolve issues and ensure the accurate, consistent, and timely administration of city income tax programs. The position also supports continuous improvement through development and maintenance of procedures, training materials, job aids, and special projects.

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: 50

Review and assess returns identified through various compliance avenues.

Individual tasks related to the duty:

- Analyze returns and taxpayer account information to determine compliance with applicable statutes, tax laws, policies, and procedures.
- Review and compare return information with available Michigan tax files, account records, and other relevant data to validate information and identify discrepancies.
- Determine and make appropriate adjustments, corrections, or disallowances based on the results of the compliance review and established policies and procedures.
- Verify that reviewed returns are accurate and appropriate for processing and submit completed returns through the applicable system for further processing.
- Identify discrepancies or potential noncompliance and initiate appropriate action, including referring returns requiring additional analysis to auditors.
- Identify potential compliance projects through analysis of review data and recommend new project opportunities and improvements to existing projects.
- Identify potential fraud patterns through analysis of tax return and account data and communicate findings to leadership.
- Review procedures and instructions, recommend revisions, and identify training or procedural needs based on trends identified through compliance review activities.

Duty 2

General Summary:

Percentage: 20

Reviewing and processing taxpayer correspondence.

Individual tasks related to the duty:

- Respond to taxpayer inquiries verbally and in writing, providing accurate information and preparing correspondence using established policies, procedures, and communication standards. Makes adjustments to returns based on taxpayer correspondence when appropriate.
- Researches appropriate reference materials (e.g. tax statutes, policies and procedures, and Revenue Administrative Bulletins) to assist in determining the proper solution for each request.
- Quickly reviews and resolves requests from the Taxpayer Advocate, Executive Office, and other high level/urgent legislative requests.
- Assist with taxpayer customer service as needed.

Duty 3

General Summary:

Percentage: 10

Leading collaboration efforts with Collections to ensure accounts are accurate.

Individual tasks related to the duty:

- Review correspondence, correct assessments, reprocess returns, and more from the Collections Services Bureau.
- Collaborate with the Bankruptcy team to complete research and responses for litigation cases.
- Review, analyze, and make determinations on requests to correct collections assessments.

Duty 4

General Summary:

Percentage: 10

Handling issues that require understanding of technical areas such as tax clearance and hearings.

Individual tasks related to the duty:

- Develop and update process for handling tax clearance requests with external clients.
- Access the secure portal shared with each city to download and distribute tax clearance requests as well as receiving and uploading tax clearance responses.
- Analyze and compare taxpayer accounts as requested
- Receive and review hearing requests to identify why a taxpayer is disputing a change made to their return by City Tax staff.
- Completing proper documentation for hearing requests.
- Representing City Taxes at hearings.

Duty 5

General Summary:

Percentage: 10

Various other duties as assigned.

Individual tasks related to the duty:

- Coordinates bureau timekeeping activities and provides support to managers and staff to promote accurate and timely submission of employee time in accordance with HR deadlines.
- Assist in identifying training needs and in the development, revision, and maintenance of training materials, procedures, and job aids. Attend and contribute to various meetings.
- Miscellaneous duties necessary for bureau operations
- Assist with special projects as needed.

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

Tax returns will be reviewed and analyzed. Incorrect decisions can have a detrimental impact on the department through lost revenue as well as negative implications when contacting compliant taxpayers. Decisions will also be made regarding when procedures need to be developed or revised. This position will also determine what information is appropriate and necessary to document for hearings/informal conferences.

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

Decisions that will result in major policy change, impact all bureau personnel, and have major budgetary impact.

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 individual must work at a desk for long periods of time. The job requires extensive use of a personal computer, consisting of repetitive motions used in keyboarding and information retrieval. The individual will present information in small group settings and may facilitate discussions in small to medium sized groups.

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?

This position serves as a technical resource for taxpayers, their representatives, and Treasury staff regarding City Income Taxes and applies complex tax laws, rules, regulations, policies, and procedures to resolve questions and account issues. The position reviews and analyzes tax returns, taxpayer accounts, correspondence, and available tax data and records to determine compliance, identify discrepancies, and make appropriate adjustments, corrections, disallowances, referrals, or other determinations consistent with established policies and procedures.

The position evaluates data and information to identify trends and recommend changes to compliance activities, processes, procedures, projects, training materials, and other operational functions. The position reviews established methods of operation, identifies training and procedural needs, and recommends improvements to the efficiency, accuracy, and effectiveness of operations. The position also provides technical support for complex activities including collections account resolution, taxpayer hearings, and tax clearance administration.

The position must communicate effectively, both verbally and in writing, with taxpayers and their representatives, Treasury employees, participating cities, and representatives of other agencies. The position requires a thorough knowledge of applicable tax statutes, departmental operations, policies and procedures, as well as proficiency in the information systems, research tools, and software applications necessary to perform assigned duties.

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?

The City Income Tax Bureau (CITB) is responsible for the timely and quality processing of tax returns, operation of a customer service contact center, ensuring taxpayer compliance with tax laws and statutes. and overall operational performance measurement. The Compliance and Collections Departmental Technician position plays a key role in assisting with responses to taxpayer inquiries, representing CITB at Hearings/Informal Conferences, and ensuring compliance returns are processed accurately, completely, and consistently according to system requirements and Department policies.

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 employee must be able to effectively communicate both verbally and in writing; research, analyze, and resolve complex tax-related matters; and exercise sound judgment in determining appropriate adjustments, corrections, disallowances, referrals, or other account actions. The employee must have a thorough knowledge of applicable tax laws, statutes, rules and regulations, as well as Department policies, procedures, and available resource materials. The employee must be able to analyze tax returns, taxpayer accounts, correspondence, and other available data to identify discrepancies, compliance concerns, trends, and opportunities for process or procedural improvement. The employee must also be able to identify training needs, recommend updates to procedures and instructions, collaborate effectively with others, and appropriately escalate complex issues. The employee must have the ability to effectively utilize Treasury information systems and applications necessary to perform assigned duties, including CXone, MiMITS (GenTax), and S/4.

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