

**MICHIGAN CIVIL SERVICE COMMISSION
JOB SPECIFICATION**

TREASURY CUSTOMER SERVICE REPRESENTATIVE

JOB DESCRIPTION

Employees in this class series perform a variety of customer service activities associated with tax filings, adjustments to accounts or other financial transactions in a service center environment having a quality monitoring system. Employees utilize a, knowledge base and case management tools to assist customers in accordance with service center standards.

There are four classifications in this job.

Position Code Title – Treasury Customer Service Representative-E

Treasury Customer Service Representative 6

This is the entry level. The employee works in a learning capacity performing a range of customer service representative assignments under close supervision.

Treasury Customer Service Representative 7

This is the intermediate level. The employee works in a developing capacity with increased responsibility for performing a wider range of customer service representative assignments.

Treasury Customer Service Representative E8

This is the experienced level. The employee performs a full range of customer service representative assignments and uses independent judgment in making decisions based on established methods and procedures.

Position Code Title – Treasury Customer Service Representative-A

Treasury Customer Service Representative 9

This is the advanced level. The employee either functions as a lead worker overseeing the work of others or as a senior worker. Senior-level employees perform complex assignments beyond those expected at the experienced level which have been approved by Civil Service.

NOTE: Employees generally progress through this series to the experienced level based on satisfactory performance and possession of the required experience.

JOB DUTIES

NOTE: The job duties listed are typical examples of the work performed by positions in this job classification. Not all duties assigned to every

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position are included, nor is it expected that all positions will be assigned every duty.

Interacts with customers via telephone or in writing to answer questions and provide assistance in understanding adjustments to tax filings, accounts or other financial transactions.

Utilizes knowledge base information to answer customer inquiries.

Inputs, updates, and/or retrieves information from various state automated customer relationship, legacy tax and collections systems.

Uses appropriate customer service techniques while handling a high volume of telephone, walk-in, or written inquiries regarding Treasury policies, procedures and regulations or providing instructions to customers.

Explains Michigan tax laws, rules and regulations to customers and assists customers in completing tax returns or other Treasury forms.

Provides information to answer questions from customers.

Alerts supervisor, lead worker, or technician when there is confusion or absence of information in the knowledge base to answer particular questions.

Maintains electronic customer records; researches data to verify customer identity and information.

Routes requests for service to appropriate staff and/or office.

Documents all contacts and outcomes within the center's case management software application.

Performs all work in accordance with established service center standards.

Initiates status reports to supervisor or lead worker when delays occur in responding to inquiries.

Compiles and prepares various reports and responds to correspondence.

Assists less-experienced representatives, as necessary.

Performs other related duties as assigned.

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Additional Job Duties

Treasury Customer Service Representative E8, 9

Participates in the training of other Treasury Customer Service Representatives or new employees.

Treasury Customer Service Representative 9 (Senior Worker)

Works with subject matter experts and responds back to customers with final answer.

Explains work instructions to others, adapting guidelines to the assignments as necessary.

Initiates status reports to customers when delays occur in responding to an inquiry, as required.

Provides guidance for other representatives with unusual or complex inquiries, including irate callers.

Handles more complex and/or sensitive inquiries, which demand a higher level of knowledge and skills.

Interprets various policies/procedures to determine necessary resolution.

Treasury Customer Service Representative 9 (Lead Worker)

Coordinates the work of the unit by determining priorities, scheduling and assigning work, and overseeing the completion of the work.

Organizes the work of others to assure that service center production and quality standards are met.

Trains lower-level Treasury Customer Service Representatives.

Reviews the work of others for accuracy and proper completion and monitoring output.

Assists in the implementation and maintenance of the Quality Assurance program for the unit based on established policy/procedure.

Evaluates contacts based on existing quality standards/documentation, providing coaching to team members that improves and maintains performance.

Identifies training needs and participate in development and delivery of training programs for team members.

JOB QUALIFICATIONS

Knowledge, Skills, and Abilities

NOTE: Some knowledge in the area listed is required at the entry level, developing knowledge is required at the intermediate level, considerable knowledge is required at the experienced level, and thorough knowledge is required at the advanced level.

Knowledge of proper customer relationship/customer service practices.

Knowledge of various computer software applications.

Knowledge of Michigan Tax laws as they apply to filing tax returns and billings.

Ability to handle high volume of customer contacts daily while maintaining a positive attitude.

Ability to work in a highly structured, measurement-oriented environment.

Ability to utilize a keyboard effectively and efficiently, as required for the work.

Ability to navigate through multiple computer applications including Internet applications.

Ability to deal with difficult customers.

Ability to multi-task in a high volume setting.

Ability to communicate effectively.

Ability to maintain favorable public relations.

Ability to interpret and explain various aspects of the Michigan tax and revenue acts.

Ability to learn and interpret the laws, rules, regulations, policies and procedures relative to the work.

Additional Knowledge, Skills, and Abilities

Treasury Customer Service Representative 9 (Senior Worker)

Ability to perform the most complex customer service representative assignments.

Ability to explain instructions and guidelines to others effectively.

Treasury Customer Service Representative 9 (Lead Worker)

Ability to organize and coordinate the work of the unit.

Ability to determine work priorities and assign work to employees.

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Working Conditions

None

Physical Requirements

None

Education

Educational level 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.

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.

Special Requirements, Licenses, and Certifications

None

NOTE: Equivalent combinations of education and experience that provide the required knowledge, skills, and abilities will be evaluated on an individual basis.

JOB CODE, POSITION TITLES AND CODES, AND COMPENSATION INFORMATION

Job Code

TRCSVREP

Job Code Description

Treasury Customer Service Representative

Position Title

Treasury Customer Service Representative-E

Position Code

TREACSRE

Pay Schedule

W41-026

Treasury Customer Service Representative-A

TREACSRA

W41-011