

**POSITION DESCRIPTION**

**RVSD 12/16/16**

DOA-15302 (C07/2015)  
PREVIOUSLY OSER-DMRS-10  
State of Wisconsin  
Department of Administration/Division of Personnel Management

|                                  |  |                             |
|----------------------------------|--|-----------------------------|
| 1. Position No.<br><b>326275</b> | 2. <b>Cert</b> / Reclass Request No.<br><b>17-7320</b><br>Effective: | 3. Agency No.<br><b>566</b> |
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|--|---|
| 4. NAME OF EMPLOYEE  | 5. DEPARTMENT, UNIT, WORK ADDRESS<br>Wisconsin Department of Revenue<br>Division of Technology Services<br>Customer Service Bureau<br>Data Capture Section<br>Data Verification & Original Entry Unit<br>2135 Rimrock Road, MS 4-224<br>Madison, WI 53714 |
| 6. CLASSIFICATION TITLE OF POSITION<br><br>Revenue Tax Assistant-Objective               |   |
| 7. CLASS TITLE OPTION (to be filled out by Human Resources Office)                       | 8. NAME AND CLASS OF FORMER INCUMBENT<br><br>Renee Kleisch Revenue Tax Assistant-Objective  |
| 9. AGENCY WORKING TITLE OF POSITION  | 10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES<br><br>Alice Bertelrud, Revenue Tax Assistant-Objective   |
| 11. NAME AND CLASS OF FIRST-LINE SUPERVISOR<br>Lisa Potts (Deegan)<br>Revenue Supervisor | 12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?   |

13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes  No   
IF YES, COMPLETE AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:  
  
**SEE ATTACHED**

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION

— GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.  
— WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.  
— TIME %: Include for goals and major worker activities.

| TIME % | GOALS AND WORKER ACTIVITIES |
|--------|-----------------------------|
|        | SEE ATTACHED                |

(Continue on attached sheets)

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION

a. The supervision, direction, and review given to the work of this position is [ ] close [ ] limited [ X ] general.  
b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.

Signature of first-line supervisor \_\_\_\_\_ Date \_\_\_\_\_

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee \_\_\_\_\_ Date \_\_\_\_\_

18. Signature of Human Resources Manager \_\_\_\_\_ Date \_\_\_\_\_

POSITION SUMMARY (Line 14)

Operating under general supervision and utilizing appropriate processes, this position data captures and/or verifies data, from a wide variety of source documents, primarily consisting of individual income documents, utilizing assigned equipment. This position requires thorough knowledge of the current processing softwares, Intelligent Forms Processing (IFP) and Kofax as they relate to the functions of data capture, and thorough knowledge of direct entry keying into the GenTax processing system. The incumbent is required to possess a thorough knowledge of prior year and current year document data capture restrictions and procedures. In addition, the incumbent must possess a thorough understanding of each document format in order to enable the incumbent to identify data capture problems and suggest data capture improvements, and have the ability to "touch" key a minimum of 45 words per minute. The incumbent is responsible to perform other unspecified data capture duties and miscellaneous duties as assigned by the supervisor.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

- 95%    A. Performance of data capture
- A1. Data capture tax document entries.
  - A2. Select appropriate program and/or method of capturing data.
  - A3. Perform Original Entry (OE).
  - A4. Data capture tax documents which have been deferred.
  - A5. Perform Original Entry Acceleration (OEA).
  - A6. Perform clerical duties as assigned.
  - A7. Perform data capture using the legacy data capture system.
  - A8. Verify computations and other information on tax documents.
  - A9. Screen tax documents.
  - A10. Apply standardized abbreviations.
  - A11. Use written procedures for missing document information.
  - A12. Utilize written instructions and procedures.
- 5%    B. Performance of other duties required for the efficient functioning of the department and to accommodate unusual workloads or staffing shortages.
- B1. Assist training of new staff or temporary employees in the proper use of the hardware and software used to data capture tax document entries.
  - B2. Perform miscellaneous duties as assigned to ensure the smooth operation of the Department of Revenue.
  - B3. Perform routine maintenance on unit equipment.
  - B4. Route documents according to established procedures.
  - B5. Enter time distribution codes on a daily basis.
  - B6. Work in other units/sections as assigned.
  - B7. Work on special projects as assigned.

KNOWLEDGES, SKILLS AND ABILITIES

1. Knowledge of the standard keyboard layout and key functions.
2. Ability to “touch” key data using a standard keyboard.
3. Ability to “touch” key numeric data using a number key pad.
4. Ability to key with an error rate of less than 5% of weekly individual production.
5. Knowledge of hardware and software used in the data capture process.
6. Knowledge of the workflow of a tax document through the work unit.
7. Knowledge of the order and function of data capture processing steps.
8. Knowledge of timeliness standards and the effect of customer deadlines on workflow throughout the Department of Revenue.
9. Knowledge of minimum work unit performance standards.
10. Knowledge of average daily production requirements in the work unit.
11. Knowledge of standard abbreviations.
12. Knowledge of U.S. Postal standard address abbreviations.
13. Knowledge of the data capture procedures for prior year as well as current year documents.
14. Knowledge of deadlines associated with the tax forms processed within the work unit.
15. Knowledge of internal and external customer expectations.
16. Possess good keyboard and calculator skills.
17. Ability to work under general supervision.
18. Ability to consistently produce highly accurate results.
19. Ability to pay attention to details.
20. Ability to consistently produce to production standards set for the unit.
21. Ability to work quickly and efficiently.
22. Ability to identify problems and suggest solutions.
23. Decision making skills
24. Demonstrate organizational and prioritization capability.
25. Ability to work on multiple tasks and meet strict deadlines.
26. Ability to exercise self-control, diplomacy, tact, and patience in dealing with customers, co-workers, varying workloads, and completing deadlines.

**Special Requirement:** Must have the ability to “touch” key a minimum of 45 words per minute with no errors.