

POSITION DESCRIPTION

IMPORTANT: PLEASE READ INSTRUCTIONS ON PAGES 2 and 3

DOA-15302 (C07/2015) PREVIOUSLY OSER-DMRS-10 State of Wisconsin Department of Administration/Division of Personnel Management	1. Position No. 339330	2. Cert / Reclass Request No. 24-9921	3. Agency No. 566
4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue IS&E/Audit Bureau/Administration/Integration & Automation 2135 Rimrock Road Madison, WI 53713		
6. CLASSIFICATION TITLE OF POSITION Revenue Management Supervisor	8. NAME AND CLASS OF FORMER INCUMBENT		
7. CLASS TITLE OPTION (to be filled out by Human Resources Office)	10. NAME & CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES		
9. AGENCY WORKING TITLE OF POSITION	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?		
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Rebecca Hotynski, Revenue Administrative Manager	13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes <u>x</u> No ___ IF YES, COMPLETE AND ATTACH A SUPERVISOR EXCLUSION 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 (Please see sample format and instructions on Page 3.)

- _ 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 (See Instructions on Page 2)

- a. The supervision, direction, and review given to the work of this position is close limited general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.
(Please initial and date attachments.)

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 _____

DISTRIBUTE COPIES OF SIGNED FORM TO:

- P-FILE SUPERVISOR EMPLOYEE CERT REQUEST COPY

REVENUE MANAGEMENT SUPERVISOR

Position # 339330

April 2024

POSITION SUMMARY (Line 14)

This is an advanced professional position with primary responsibility to independently coordinate and synchronize the department's audit programs, integrated tax and other technology systems with business requirements and processes critical to units, and divisions throughout the department as well as external stakeholders. Under the general direction of the Audit Bureau Deputy Director, this position is responsible for leading, mentoring, and directing the team that develops processes for troubleshooting, recovering, adjusting and modifying or enhancing the system and processes while providing the support necessary to minimize interruptions and assist the business areas to apply the integrated tax technology to meet their business requirements.

This position supervises staff whose responsibility it is to partner with technology systems, business systems, and external stakeholder experts to lead, plan, and coordinate efforts related to the evaluation, design, development, analysis, documentation, testing, training, implementation, and maintenance for assigned systems and processes, both automated and manual, throughout the department, providing expertise to business users when problems arise with tax and collection applications and as necessary to develop taxpayer and external stakeholder instructions.

Other duties are reviewing proposed legislation for fiscal impact and DOR, State, and Federal statutes, rules, policies, procedures, and forms/publications for changes to the existing business requirements and processes as well as the agency's integrated technology systems and leading the effort to synchronize changes that affect the existing business requirements for the assigned applications. This position initiates and effectively communicates with department technical and business user staff and vendors, and other state, county, and local agencies and districts; provides training for user staff with regard to technology systems operations; and consults with technical staff to provide expert, specialized guidance with regard to the required data storage and use, input, and output of technology systems.

Especially difficult and complex, advanced level work with a bureau and division impact. This position serves under the general supervision of the Audit Bureau Deputy Director, with limited supervisory review of objectives, priorities, recommendations, or solutions.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

- 40%
- A. Lead the coordination and planning of efforts to evaluate, analyze, design, develop, enhance, document, test, implement, maintain, and train for changes or improvements to systems, applications, and processes.
 - A1. Lead and participate on teams representing business needs to technical staff, and technology system capabilities to business staff.
 - A2. Review and evaluate existing operations to determine, recommend, and implement needed changes and to identify problems and initiate corrective action.
 - A3. Manage and coordinate the creation, prioritization, communication, tracking, verification and completion of issue tickets for integrated systems.
 - A4. Review and interpret statutes, rules, policies, and procedures for impact, and when necessary clarify and revise programming specifications and operational specifications impacting the assigned business area.
 - A5. Facilitate discussions between all appropriate technical and business staff and external stakeholders to clarify business rules, define system output, facilitate the design of business and technology system processes, and negotiate project timeline changes.
 - A6. Coordinate department business program specialist and technical staff efforts to clarify, revise, develop, and implement process and programming specifications.
 - A7. Identify affected users impacted by proposed design changes of the existing system(s) and

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gain consensus from them on effective resolution.

- A8. Create documentation of process and system development and changes; and assist business and technical staff to draft new procedures and publications.
- A9. Analyze, monitor, and prepare feasibility studies, cost estimates and justifications, and recommend priority of programming requests.
- A10. Prepare, review, and revise programming request information utilizing the Department's Systems Development Methodology process, project management techniques, data gathering and presentation, group development and interaction, and meeting management to accomplish goals.
- A11. Develop, review, monitor, evaluate, revise, and negotiate changes to programming request information and business project plans and schedules including resource estimates, milestones, and deliverables, while utilizing the Department's Systems Development Methodology process. Make recommendations for prioritization.
- A12. Direct, assist, and mentor other project and application staff.

15% B. Provision of expert, specialized guidance and training.

- B1. Evaluate existing processing operations, system output, and new technology to recommend to program area management efficiencies and improvements in existing, or the need for new, business processes/requirements and/or technology systems.
- B2. Act as the assigned business area's primary expert liaison to clarify and revise programming specifications and systems operations; and to design, develop, implement, and maintain the integrated tax and other technology systems that support the business requirements for the assigned business area.
- B3. Coordinate user development and testing, and plan implementation schedules.
- B4. Develop training plans and materials and implement training employees in the use of the system.
- B5. Research, collect, and analyze data; prepare reports summarizing findings, conclusions, providing guidance and recommendations; publish results when applicable.

15% C. Assurance of quality output when changes occur in technology, business requirements, or processes.

- C1. Confirm the department's technology system output continues to be correct when implementing new or changing existing business rules or processes.
- C2. Assure that the business area's requirements continue to be met when new technology systems are implemented or existing technology systems are changed.
- C3. Develop, review, approve, coordinate, and implement software test scripts, test cases, and test plans for the assigned business area's systems to coordinate programming and process changes and to implement annual law changes.
- C4. Verify system changes implemented for the assigned business area do not adversely affect other organizational units using the system by coordinating the work of technology and business staff.
- C5. Analyze and document business rules and requirements, and system operations and procedures.
- C6. Monitor system output to identify problems and initiate corrective action.

20% D. Supervision of staff.

- D1. Conduct performance evaluations.
- D2. Support and implement agency affirmative action policies and plans in all aspects of personnel administration.
- D3. Respond to employee requests for leave, changes in assignments, complaints, and grievances.

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- D4. In cooperation with or at the direction of the unit manager, recommend/initiate personnel actions (including but not limited to hiring, reclassification, reallocation, competitive promotional examination, etc.) as needed to ensure appropriate and effective allocation of staff resources and compensation of employees.
- D5. Review and approve employee's periodic administrative reports, such as weekly time reports, entries on PTA web, and expense vouchers.

10% E. Performance of other duties as assigned.

- E1. Regularly review outstanding requests for resources
- E2. Communicate prioritization status of projects to business users
- E3. Work cooperatively with Audit Bureau leadership to effectively prioritize requests.
- E4. Attend and participate in unit, section, bureau and departmental meetings, teleconferences, and training sessions.
- E5. Maintain and timely file reports as assigned.
- E6. Other duties as assigned

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KNOWLEDGE, SKILLS, AND ABILITIES

1. Thorough advanced knowledge of:
 - a. All aspects of the integrated tax system(s) related to the assigned business area, as well as the business rules, principles, and practices for the systems and processes that interact with it.
 - b. The department's technical and business area programs, processes, and requirements; and its policies, objectives, and mission.
 - c. Leadership techniques, project management, process and system analysis and design, data modeling and design, general data processing methods, techniques for business rule, script, and flow chart development, dynamics of public presentation, and communication methods and facilitation techniques.
 - d. Department initiatives and changes as well as technology abilities and trends in order to make recommendations to management, business staff, and team members.
2. Advanced ability to:
 - a. Understand, elicit, and develop business and technology requirements.
 - b. Convert business requirements to technology system requirements.
 - c. Recognize how and when to improve a process or system.
 - d. Recommend, negotiate, facilitate and implement change.
 - e. Work effectively with staff at all levels of responsibility and authority throughout the department.
3. Excellent business and technical knowledge of assigned business area processes and applications.
4. Thorough working knowledge of the department's policies, objectives, and mission.
5. Advanced ability to work independently and to learn and acquire information independently.
6. Ability to strategize and plan for future.
7. Ability to develop and follow strategic and operational project plans.
8. Strong analytical and evaluation skills.
9. Advanced ability to elicit and transform business requirements into system specifications and to develop user stories, workflow, test procedures and test scripts.
10. Excellent verbal and written communication skills.
11. Effective communication in small and large group settings, including public speaking.
12. Ability to take initiative to assertively represent business needs, to stand firm when necessary and to compromise when possible, to diplomatically challenge assumptions, and to make recommendations to business and technical staff at all levels of responsibility and authority throughout the department.
13. Ability to coordinate people, projects, and methodologies.
14. Ability to work and effectively communicate with DOR customers, vendors, business analysts, business users, peers, and management.
15. Thorough working knowledge of personal computer software and applications.
16. Ability to identify, manage, troubleshoot, and resolve problems.
17. Solid organizational and time management skills to work independently and within a team.
18. Knowledge of supervisory principles and techniques.

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DIVISION OF PERSONNEL MANAGEMENT
DOA-15316 (C07/2015)
S. 230.09 WIS. STATS.
PREVIOUSLY OSER-DCLR-84



COMPENSATION & LABOR RELATIONS
101 E. WILSON ST, 4TH FL
MADISON, WI 53703

Supervisor Exclusion Analysis

This information is to be provided by the position's supervisor and reviewed by the agency central office human resources representative for both filled and vacant positions and must be submitted as part of any position description (PD) for a position performing supervisory responsibilities (i.e., if # 13 of the PD is checked YES). This information will be used to determine (1) if the position is performing supervisory functions and thus should be allocated to a supervisory classification and (2) what supervisory classification is appropriate based on the total duties of the position.

According to s. 111.81(19), Wis. Stats., a supervisor is any individual "who has authority, in the interest of the employer, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline employees, or to adjust their grievances, or to authoritatively recommend such actions" and "whose principal work is different from that of the subordinates." The criteria used by the Wisconsin Employment Relations Commission (WERC) to apply this definition include: the authority to effectively recommend the hiring, promotion, transfer, discipline or discharge of employees; the authority to direct and assign the workforce; the number of employees supervised (typically a minimum of 3 FTE permanent employees); the amount of time spent supervising; the number of other persons exercising greater, similar or lesser degrees of authority over the same employees; the level of pay, including an evaluation of whether the supervisor is paid for skill or supervision of employees; whether the supervisor is primarily supervising an activity or is primarily supervising employees performing the activity; whether the supervisor is a working supervisor or whether he/she spends a substantial majority of his/her time supervising employees; and the amount of independent judgment and discretion exercised in the supervision of employees. The WERC ultimately determines the appropriateness of supervisory exclusions.

Position Identification Data

1. Name of Employee (if filled): _____
2. Civil Service Classification: Revenue Management Supervisor
3. Department and Division: Revenue/Income, Sales & Excise Tax
4. Bureau, Section and Unit (or comparable): Compliance
5. Name and Classification of Supervisor: Susan Dukes – Revenue Administrative Manager
6. Name and Complete Civil Service Title of Former Incumbent (if any): Kyle Jackson – Revenue Management Supervisor

7. Supervisory Responsibilities

- a. In view of the definition statement and criteria listed in the second paragraph of this form, does the incumbent of this position:

- (1) have the responsibility for directly supervising the activities of other classified employees? YES x NO ___
- (2) have the responsibility for supervising the activities of lower level supervisors? YES ___ NO x
- (3) meet the definition statement and criteria? YES x NO ___

- b. List the official classification titles and number of permanent classified employees (full or part-time) directly supervised by the incumbent. If this position supervises lower level supervisors, indicate the number of employees supervised by the lower level position(s) in parentheses after the classification title of the position. (NOTE: LTE, student, patient/inmate, volunteer, and unclassified employees should be specifically identified since the direction of these individuals is not considered to warrant supervisory status.)

IS Business Automation Senior (3); IS Business Automation Analyst (1) Revenue Tax Specialist 2 (1)

DOA-15316 (C07/2015) CONTINUED

Supervisor Exclusion Analysis

- c. What percentage of this position's total time is allocated to each of the following?
- 1) Supervisory functions (i.e. hiring, dismissing, disciplining employees, evaluating performance, settling grievances)? 20%
 - 2) Activities relating to supervisory responsibilities (i.e., establishing operating procedures, reviewing work of subordinates, counseling subordinates on performance, training and orienting new employees, performing related administrative functions, etc.)? 10%
 - 3) Performance of other work activities similar to those of the employees supervised? 15%
 - 4) Performance of other non-supervisory work activities different from those of the employees supervised (including program administration)? 55%

*NOTE: The totals of c.1), 2), 3), and 4) must equal 100%.

 *100%

8. Organizational Relationships

List (in order of descending authority) the names and classification titles of all other positions in the employing unit in the chain of command over the employees listed in 7.b.

- Diane Hardt, Division Administrator
- Vicki Gibbons, Deputy Division Administrator
- Catherine Bink, Director Compliance Bureau
- Susan Dukes, Deputy Director Compliance Bureau

A copy of the organizational chart must be attached for the immediate work unit (i.e., the organizational unit which includes the employees supervised), including the names and classifications of all employees.

9. Supervisory Activities

Is this position identified as a formal step in the employee grievance procedure? YES ____ NO ____
(If no, list below the name and classification of the first formal step in the grievance procedures for the employees listed in 7.b.)

A signature below means the position has been reviewed and you have concluded it meets the definition of supervisor found in s. 111.81 (19), Wis. Stats.

Supervisor _____ Date _____

Human Resources Representative _____ Date _____

To be completed by Incumbent (for filled positions):

- I agree with the preceding statements.
- I do not feel that the preceding statements are accurate for the reasons indicated below.
- No Comment _____

Employee Signature _____ Date _____

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DIVISION OF PERSONNEL MANAGEMENT
DOA-15317 (C07/2015)
S. 230.09 WIS. STATS.
PREVIOUSLY OSER-DCLR-85



COMPENSATION & LABOR RELATIONS
101 E. WILSON ST, 4TH FL
MADISON, WI 53703

Management Exclusion Analysis

This analysis should be completed by the position's supervisor and reviewed by the agency human resources representative prior to classifying a position as "management." The information will be used to assist in determining if the position is performing duties which support inclusion of the position in a career executive or other management classification, resulting in exclusion of the position from bargaining unit representation.

Wisconsin Statute s. 111.81(13), excludes management personnel from the definition of employee for collective bargaining purposes. Section 111.81(13) defines "management" to include "those personnel engaged predominately in executive and managerial functions, including such officials as division administrators, bureau directors, institution heads, and employees exercising similar functions and responsibilities as determined by the [Wisconsin Employment Relations] Commission."

The Commission referenced above is the Wisconsin Employment Relations Commission (WERC) which, under s. 111.825(3), assigns eligible employees to the appropriate bargaining units and ultimately determines the appropriateness of management exclusions.

Position Identification Data

1. Name of Employee (if filled): _____
 2. Civil Service Classification: Revenue Management Supervisor
 3. Department and Division: Revenue/Income, Sales & Excise Tax
 4. Bureau, Section, and Unit (or comparable): Compliance
 5. Name and Classification of Supervisor: Susan Dukes, Revenue Administrative Manager
 6. Name and Complete Civil Service Title of Former Incumbent (if any): Bryan Hoelt, Revenue Management Supervisor
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In Case 33, No. 16403, SE-65, Decision No. 11640-C, the WERC used the following criteria in determining if employees were management. (Some of the statements are interpretations of statements made by the WERC rather than statements actually made in the decision.)

7. If the employee is a division administrator, bureau director, or institution head, the employee is, per se, management.
8. If the employee is not a division administrator, bureau director, or institution head, and if the employee is engaged predominately in executive and managerial functions similar to those engaged in by division administrators, bureau directors, or institution heads, the employee is management.

"Predominate function" is defined as the primary duties performed by the employee. If the primary duty is to provide legal services or supervise and review the work of others for compliance with established policy, the employee is not engaged predominately in executive and management functions, even though some of the time is spent in formulation, determination, and implementation of management policy. Predominate functions may be based on importance or percent of time spent. Generally, percent of time spent will be the determining factor.

(OVER)

DOA-15317 (C07/2015) CONTINUED

Management Exclusion Analysis

“Executive and management functions” are defined as:

- a. participation in a significant manner in the formulation, determination, and implementation of management policy; or,
- b. effective authority to commit the employer's resources.

To participate in a significant manner in the formulation, determination, and implementation of management policy, the employee must have greater authority than merely offering advice to higher-level management which may accept or reject the recommendation, or must do more than serving on a management team/committee which must reach consensus. Formulation, determination, and implementation of management policy must be the primary duty of the employee and must be at a level similar to that exercised by division administrators, bureau directors, and institution heads.

Case 33 did not address the resource commitment aspect of the executive and managerial functions. In municipal sector cases, the WERC has defined this aspect as the exercise of effective authority to commit the employer's resources such as through exercise of authority to establish an original budget or to allocate funds for differing program purposes from such an original budget when the purpose of such funds has not been previously specified.

9. Rationale for the above conclusion (use additional paper if necessary):

This position is responsible for participating in a significant manner in the formulation, determination, and implementation of management policy regarding the department's agency collection programs including statewide debt collection, refund interception programs, and federal and state reciprocal collection initiatives. The position is responsible for making the establishing IT project priorities, and working to identify and implement automated options for use by multi-generations, including networking with other state agencies, other states and the federal government to identify potential opportunities for advancement to meet divisional goals to operate efficiently. This position will be responsible for developing queries, discoveries and analytics to efficiently identify non-compliance by taxpayers, and to meet all established due dates and deadlines for legislation, budget and administrative rules. This position also reviews proposed legislation for fiscal impact.

This position has primary responsibility to independently coordinate and synchronize the department's integrated tax and other technology systems with business requirements and processes critical to units and divisions throughout the department. Under the general direction of the Deputy Director, this position is responsible for leading, mentoring, and directing the team of content experts, business users, and programmers that develop processes for troubleshooting, recovering, adjusting and modifying or enhancing the system and processes while providing the support necessary to minimize interruptions and assist the business areas to apply the integrated tax technology to meet their business requirements. This position will supervise staff whose responsibility is to partner with technology systems and business system experts to lead, plan, and coordinate efforts related in the evaluation, design, development, analysis, and documentation, testing, training, implementation, and maintenance for assigned systems and processes, both automated and manual, throughout the department, providing expertise to business users when problems arise with business tax applications as necessary to develop taxpayer instructions. This position also manages Tax Specialist 2 staff responsible for all aspects of training and quality review including coordinating new and on-going classes, reviewing and providing feedback to agents and supervisors, and developing and leading the development of training content.

This position is responsible for helping meet the Division's mission to collect taxes by processing returns and payments, issues refunds, enforces tax laws through audits and compliance activities, collects delinquent taxes, provides taxpayer assistance and informal technical guidance to taxpayers, issues private letter rulings, manages unclaimed property, and conducts criminal investigations.

A signature below means the position has been reviewed and you have concluded it meets the definition of management found in s. 111.81(13), Wis. Stats.

Supervisor Signature _____ Date _____

Human Resources Representative _____ Date _____