

**Effective Date: June 3, 2001**  
**Modified: November 14, 2004**  
**Modified: February 15, 2009**  
**Modified: December 5, 2010**

**STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION**

**REVENUE CUSTOMER SERVICE REPRESENTATIVE  
CLASSIFICATION SERIES**

**I. INTRODUCTION**

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future customer service positions located within the classified service in the Department of Revenue. Positions allocated to these classifications are located in the Customer Service Bureau and handle tax and other department related inquiries. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area.

Classification decision must be based on the "best fit" of the duties within the existing classification structure. The "best fit" is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of represented positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification series encompasses Revenue Customer Service Representative positions that are located within the Department of Revenue, Customer Service Bureau. Positions allocated to this classification are responsible for handling refund inquiries, ranging from routine to very complex research, the majority of the time. Refund inquiries require researching information contained on computer systems but do not require responding to inquiries where the intention of the law is not clear or requires significant research into policy or law. Positions in this series are distinguished from other Revenue series, such as Revenue Tax Assistant, Revenue Tax Representative, and Tax Representative by the amount of external customer service provided and the subject matter involved.

C. Exclusions

Excluded from this classification (series) are the following types of positions:

1. Positions which perform duties for a majority of the time (more than 50% of the time) that are better described by the Revenue Tax Assistant, Revenue Tax Representative, and Tax Representative classification specifications.
2. Positions which, for a majority of the time (more than 50%) are not engaged in the provisions of customer service in the Customer Service Bureau.
3. Positions which meet the statutory definitions of supervisor, management, or confidential as defined in Wis. Stats. 111.81(19), (13) and (7) as administered and interpreted by the Wisconsin Employment Relations Commission.
4. Positions which are not located in the Department of Revenue.
5. Positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression Through This Classification Series

Employees enter positions within this classification series by competition. Progression to the objective level will occur through reclassification as the employee achieves the specified training, education or experience necessary to perform the duties under general supervision.

## II. DEFINITIONS

### **REVENUE CUSTOMER SERVICE REPRESENTATIVE - ENTRY**

This is entry level customer service work within the Customer Service Bureau performed under close progressing to limited supervision. Customer service provided in this classification involves routine research related to customer refunds including: providing information regarding interest and penalty provisions, Homestead and Earned Income Credit pre-refund review procedures, offset of refunds, and electronic funds transfers. Research may involve consulting with entities external to the bureau and department. These positions have the authority to stop and reissue refunds and modify accounting transactions. Forgery investigations are initiated and coordinated by these positions. These positions also provide information obtained from a variety of computer systems and tax booklets.

### **REVENUE CUSTOMER SERVICE REPRESENTATIVE - DEVELOPMENTAL**

This is developmental level customer service work involving difficult research within the Customer Service Bureau as described above performed under limited progressing to general supervision.

### **REVENUE CUSTOMER SERVICE REPRESENTATIVE - OBJECTIVE**

This is objective level customer service work involving complex research within the Customer Services Bureau as described above performed under general supervision.

## III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an

identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

#### **IV. ADMINISTRATIVE INFORMATION**

This classification was created effective June 3, 2001, and announced in Bulletin CLR/SC-131 to accommodate the creation of a Customer Service and Education Bureau in the Department of Revenue. This classification series was modified effective November 14, 2004 and announced in OSER-0055-MRS/SC to add an allocation to the Advanced level describing a position in the Customer Education Unit. This classification series was modified effective February 15, 2009 and announced in Bulletin OSER-0233-MRS/SC to reflect changes as a result of a reorganization of the Customer Service Bureau. This classification series was modified effective December 5, 2010 and announced in Bulletin OSER-0275-CLR/SC as a result of a reorganization of the Customer Service Bureau which includes the elimination of the advanced level.

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