

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

UNCLAIMED PROPERTY 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 paraprofessional positions located at the Department of Revenue which function as Unclaimed Property Representatives. This classification specification is not intended to identify every duty which may be assigned to positions but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions 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 classification 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 representative positions; job evaluation guide charts, standards, or factors; statements of inclusion and exclusion; license or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification series encompasses positions located at the Department of Revenue which perform paraprofessional work which requires specialized knowledge of the unclaimed property programs administered by the Department. Positions allocated to this classification gather and verify information about claims under the Uniform Unclaimed Property Act Ch.177 Wis. Stats., Interstate Succession Chapter 852 Wis. Stats., and administrative rules and program policies. Positions allocated to this classification series spend the majority of their time analyzing, reviewing, and processing records and forms to administer claim management under statutory provisions; providing direction to claimant (or their representatives) about claim requirements and eligibility; and computing and determining payments or assets/securities transfer.

C. Exclusions

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

1. Positions which meet the statutory definitions of professional employee, supervisor, and management, as defined in s. 111.81(15), (19), and (13), Wis. Stats.
2. Positions which are not located at the Department of Revenue.

3. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression Through This Series

Entrance into this classification series is by competition. Progression to the objective level is through reclassification, as the employee attains the specified training or experience required and has satisfactorily performed the work described at the higher level for at least six months under general supervision.

E. Terminology Used in This Classification Specification

Paraprofessional: Work that is similar to “professional” work but does not have the breadth and depth of true professional work. A paraprofessional employee performs duties that are a narrow, specialized subset of professional duties, does not perform the full range of duties assigned to professional employees, or performs duties of lesser scope, impact, and complexity than duties assigned to professional employees. Paraprofessional duties support the work of professional employees. A paraprofessional employee may carry out or implement plans or projects that are developed, planned, and managed by professional employees, based on extensive experience and supplemental on-the-job training rather than on formal academic education in the discipline itself. Paraprofessional work is performed in a narrow or highly specialized area of the overall occupation and requires a high degree of practical knowledge and skill. The paraprofessional employee often works with considerable independence for significant periods of time. This independence, however, does not alter the nature and character of the work, which is to support a professional discipline.

II. DEFINITIONS

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This is the entry level for positions in this series. Positions at this level develop knowledge and skills in the program area, rules, laws, and principles, including the associated procedures, practices, and techniques. Positions gather and verify information about unclaimed property claims. In making claim determinations, positions assess the following: the identity of the claimant, legal right to the funds, the owner of the property, and other information as needed (e.g. former address, birthdate, etc.). Positions review and process claim applications from claimants or their representatives; this task may include the review of legal documents such as wills, birth/death certificates, trusts, and stock ownership documents. Positions assist with the disposition of safe deposit box contents. Positions are also involved in outreach efforts to locate claimants of unclaimed property. When training has been completed, positions have authority to place Level 1 & 2 approvals on claims up to \$10,000 and stock claims. Positions at this level perform under close progressing to limited supervision.

UNCLAIMED PROPERTY REPRESENTATIVE – SENIOR

This is the full performance level for positions in this series. Positions at this level have acquired a broad knowledge of the program area, rules, laws, and principles, including the associated procedures, practices, and techniques necessary to manage and process claim requests. Positions perform complex claim analysis (e.g. determining succession and legal kinship, etc.) which involves interpretation of rules, contracts, and policies, to determine the appropriate action. Positions perform the full scope of activities necessary to process the full range of claim requests from start to finish. Positions recover funds if an

error in disbursement has occurred. Positions have authority to place Level 3 approvals on claims up to \$50,000 and stock claims. Positions at this level perform 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 series was created effective October 20, 2013, and announced in Bulletin OSER-0344-MRS/SC, in order to describe positions which perform paraprofessional work which requires specialized knowledge of the unclaimed property program administered by the Department of Revenue.

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