Position Summary

Under the limited supervision of the Management Information Chief, this position coordinates, executes and monitors production runs for all production tax forms, schedules, payments and letters processed through the scanning system. It also verifies that batch payment amounts, record counts and reports are balanced as well as corrects discrepancies and resolves batch job failures, abnormal terminations and other production scanning software systems problems. In addition, this position provides scanning system support by diagnosing system failures and performing recovery functions and assists in maintaining scanning configuration and equipment. It also corrects system errors, creates configuration documentation and works with other staff to assure set-up and installation meet Department of Revenue and Division of Enterprise Technology standards.

Other duties include, but are not limited to, maintenance of records, documenting scanning processes and procedures, providing production scanning training and performing leadworker duties as directed.

70% A. Coordinate, execute, and monitor production runs for multi-platform scanning and data verification systems.

25% A1. Execute data extraction processes for all production tax forms, schedules, payments, and letters processed through the scanning system.
A2. Verify that production batch payment amounts, record counts and reports are balanced.
A3. Correct discrepancies between the scanning system’s reported batch total and reports submitted to the Financial Management Services Bureau.
A4. Ensure that checks and batch control reports are routed to the Financial Management Services Bureau timely.
A5. Reject documents from batches that are scanned under incorrect Forms Year or Class type and route to proper Processing Unit or deposit in correct sort to rescan as batches come up for extract.
A6. Execute re-scan processes on production tax forms, schedules, payments, and letters processed through the scanning system.

15% A7. Resolve batch job failures, abnormal terminations and other problems with production scanning software systems.

10% A8. Monitor and operate multi-platform, integrated, scanning hardware and software systems.
A9. Perform Leadworker duties as assigned.

15% B. Scanning system support, including auditing, diagnosing, and resolving production problems.

B1. Diagnose system failures and perform recovery functions with forms processing monitors.
B2. Responsible for daily assignment of scanner ID’s to ensure document locator number will not be duplicated.
B3. Assist Division of Technology Services (DTS) personnel, including Application Environment Support and Workstation Support Technicians in maintaining scanning configuration and equipment.
B4. Audit and analyze scanning data and forms data to identify and correct system errors.
B5. Create and maintain scanning equipment and software configuration documentation.
B6. Perform deferred data verification containing forms deferred by others that contain incorrect or missing information to correct and route through the system.
B7. Work with business area experts, application systems developers, and contract vendors to assure that set-up and installation of production systems meet DOR and DET standards.
10% **C. Maintenance of records.**

C1. Assign destruction date for original tax returns for all tax types processed by scanning.
C2. Release paper copies of original tax returns for destruction.
C3. Release electronic record of data captured for extraction to tax processing software.
C4. Ensure that quality and retention standards have been met.
C5. Maintain unit batch processing records to ensure that documents are extracted timely in order to meet deadlines.
C6. Retrieve image and/or paper copy of documents and assist in resolving process and system problems.
C7. Ensure that all documents received are processed completely and timely and are boxed in a manner which makes them easy to identify and locate.

5% **D. Performance of other duties required for the efficient functioning of the Unit.**

D1. Document and implement scanning processes and procedures.
D2. Provide back up to the other Leadworker of the scanning unit.
D3. Complete special assignments as assigned by Data Capture Section Chief.
D4. Collect and maintain statistics and metrics for the scanning unit.
D5. Research forms and find solutions in error correcting for other Units when problems arise.
D6. Train assigned staff in the proper methods required for executing production scanning runs, batch balancing, data extraction, and check reconciliation.
D7. Recommend changes that would aid in quality control when errors in scanning processes occur.
Knowledge, Skills, and Abilities

1. Knowledge of the technical operation of the Kodak and BancTech scanners.
2. Knowledge of the scanning software and operating system for the Kodak and BancTech scanners.
3. Knowledge of settings and configuration of the scanning system software.
4. Knowledge of how the forms training aspect of the scanning system works.
5. Knowledge of how to diagnose and resolve scanner hardware or software errors.
6. Knowledge of how to operate forms processing computers and software.
7. Knowledge of the order of scanning processing steps.
8. Knowledge of the order of data capture and data verification steps.
9. Knowledge of processing production batch runs for scanning, rescanning and data capture jobs.
10. Knowledge of processing production batch runs of scanning extract jobs.
11. Knowledge of Scanner software purge processes.
12. Knowledge of how to process remittances (checks) for all types of tax returns and payment vouchers (including Compliance Payments, Income and Business tax payments).
13. Knowledge of how to reconcile, process, and complete reports for remittance batches.
15. Knowledge of how to perform scanner rescans, including pulling returns and making corrections.
17. Knowledge of timeliness and standards and the effect of customer deadlines on workflow.
18. Knowledge of department accounting principles, practices, and batch balancing/payment reconciliation needs.
20. Knowledge of training techniques for all personnel; permanent and LTE's and evaluation for the operation of the Kodak and BancTech scanners and department procedures for the scanning operations.
21. Knowledge of the Department of Revenue scanning procedures, policies, and requirements related to image quality and retention.
22. Knowledge of the support and maintenance of the Kodak and BancTech Scanner hardware to prevent breakdown and to achieve a high quality image for document storage in production libraries.
23. Knowledge of how to train scanner software for fields on all scanned forms for quality data capture.
24. Ability to create weekly scanning data reports and other reports as assigned by the Data Capture Section Chief.
25. Leadership skills and abilities.
26. Ability to coordinate the completion of various workloads and competing deadlines or other employees.
27. Ability to train, assist, guide, assign and review the work of employees.
28. Ability to work quickly and efficiently.
29. Ability to consistently product at a high level to production standards set for the unit.
30. Ability to identify problems and suggest solutions.
31. Skills in Microsoft Office (e.g. Excel, Word, Outlook, etc.)
32. Ability to work with confidential and sensitive information (e.g. tax, other personal identifiable information)
33. Ability to write instructions and procedures to document work processes and hardware/software configuration.