

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. 314596	2. Cert / Reclass Request No. 24-9973	3. Agency No. 566
4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue Lottery Division/Business Operations Bureau/Retailer Contracting and Financial Services Section 2135 Rimrock Road Madison, WI 53714		
6. CLASSIFICATION TITLE OF POSITION Lottery Services Specialist (07-04)	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	13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes ___ No <u>X</u> 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

(Continue on attached sheets)

SEE ATTACHED

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

LOTTERY SERVICES SPECIALIST

Position # 314596

Date April 2024

POSITION SUMMARY (Line 14)

In conjunction with Lottery sales staff and the gaming system vendor, this position works with Lottery retailers and applicants by providing information, guidance, problem resolution, and other services relating to Lottery Retailer Contracting and Financial Services.

This position will support the Retailer Contracting and Financial Services Section by providing resolution of retailer issues relating to contracting and accounting. This position will assist with activities relating to contracting such as new applications, renewals, and discontinuations, as well as monitoring for adherence to state statutes and guidelines. This position will also assist with critical financial functions including the weekly Electronic Funds Transfer (EFT) billing, performing adjustments as needed, and assisting with financial reporting for internal and external customers.

This position works under close to limited supervision of the Retailer Contracting and Financial Services Section Supervisor.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

60% A. Provision of Retailer Services.

- A1. Maintain a high level of customer service and satisfaction by promptly answering calls and emails from current or potential retailers to ensure a timely start-up and optimization of sales, responding to retailer questions, and resolving problems without delay, and following up on items through the use of GEM Intelligence and the gaming system.
- A2. Track status of problem resolution and follow up with retailers to ensure satisfactory resolution.
- A3. Identify issues that have policy implications and refer them to supervisor with a recommendation for action/policy change.
- A4. Communicate orally and in writing with independent retailers, corporate staff at chain headquarters, nonprofit organizations, state agencies, and Lottery and Vendor staff concerning questions about retailer contracting and accounting.
- A5. Provide training to new retailers on Lottery operations, answer questions, and assist with training on an as needed basis on topics like policy, procedures, applications, contracts, renewals, ticket confirmation and activation issues, equipment installations, and invoicing and billing.
- A6. Coordinate with retailer, vendors, and Lottery staff all transactions required for change of account ownership and update retailer records as changes occur.
- A7. Coordinate and communicate work orders with vendor, via HASF (Historical Agent Status Form), for installations, moves, removals of equipment, and changes of ownership and communicate with vendor on behalf of retailer for any non-ticket producing moves.
- A8. Communicate and coordinate with retailers, gaming system vendor, and internal staff the dates, times, and Lottery terminal equipment needs for installation, relocation, or removal upon completion of contracting requirements. Assign equipment for optimization of sales at retail locations.
- A9. Receive and evaluate retailer concerns and identify patterns that may require additional research. Report the findings to the appropriate staff or their supervisor.

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- A10. Evaluate the no sales report, perform analysis, and resolve any potential issues with retailers that have no sales for the previous week, which could be equipment related. Provide report to other managers within Retailer Relations and Sales Bureau and Business Operations Bureau.

30% B. Performance of Financial Functions.

- B1. Review the performance of the Electronic Funds Transfer (EFT) billing and adjustments function for instant and online games for both for-profit and non-profit retailers.
- B2. Maintain a high level of customer service and satisfaction by promptly resolving issues related to retailer invoices and billing processes that can affect the retailer's contractual standing. If retailer statement errors are discovered, recommend and coordinate corrections to resolve the error(s).
- B3. Provide Lottery Accounting the weekly summary of daily retailer online and instant ticket activity to reconcile with STAR and the lottery gaming system.
- B4. Review weekly reports of non-fund transfer (NFT) activity. Communicate with retailers regarding NFT transactions. Prepare violation notification letters and recommend formal contract violation review to the supervisor as needed.
- B5. Perform, review, and release account adjustments as needed.
- B6. Make recommendations for changes that may streamline the accounts receivable process to maximize efficiency by use of technology or aid in automating reconciliations between Retailer Accounting, Lottery Accounting, the lottery gaming system, and the STAR accounting system.
- B7. Process retailer bank changes and ensure NACHA compliance.

5% C. Assist with Retailer Contracting Critical Tasks.

- C1. Assist with reviewing applications for proper documentation and required fees.
- C2. Enter retailer application information into the Lottery gaming system and document actions in the customer management program, currently GEM Intelligence, including assigning tasks for Field Marketing Representatives (FMRs).
- C3. Determine applicant eligibility for a contract. Review application information and complete statutorily required checks using information from the Department of Revenue (DOR), Department of Workforce Development (DWD), and the Department of Justice (DOJ). Notify applicants of delinquency and how to proceed.
- C4. Issue contracts, renewals, and Certificates of Authority to applicants with appropriate instructions. Answer retailer questions and concerns. Issue application and contract updates in accordance with state statutes and administrative rule.
- C5. Conduct tax ID verification for new and renewal applications.
- C6. Verify and record physical location IDs to ensure accurate RPP payments.

5% D. Other projects and duties as assigned.

- D1. Assist other areas within the Sales Bureau, including International Game Technology (IGT) Telemarketing staff.
- D2. Maintain contracting and accounting paper and electronic files while maintaining RDAs.
- D3. Monitor IRS and DOR tax compliance and NACHA changes. Refer to supervisor with recommendation for change in procedure.
- D4. Any other projects as assigned by the Retailer Contracting and Financial Services Supervisor or Business Operations Bureau Director.

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KNOWLEDGE, SKILLS AND ABILITIES

1. Extensive knowledge of the Lottery computer gaming system and its operational processing flows as well as understanding and applying relevant state statutes, rules, and regulations.
2. Knowledge of business practices and customer service principles and techniques appropriate to program objectives.
3. General knowledge of State Statutes Chapter 565.10 (State Lottery; Retailer contracts), and Administrative Code Chapter Tax 61 (Retailers), Tax 62 (Major Procurements), Tax 63 (Non-Profit Organization Retailers).
4. Ability to exercise sound judgment and discretion in developing, applying, and interpreting state and agency policies and procedures.
5. Advanced knowledge of Lottery retailer contracting policy and procedures.
6. Advanced knowledge of computer business software packages such as those contained in Microsoft Officesuite (Word, Excel, PowerPoint, Outlook).
7. Knowledge of the methodology needed to prepare accurate accounting statements and reports.
8. Effective team participation and team building skills.
9. Effective decision-making skills involving best judgment.
10. Ability to communicate effectively both verbally and in writing to a broad range of customers.
11. Ability to establish effective working relationships with supervisors, management, co-workers, and customers.
12. Ability to solve problems in a rational, systematic manner resulting in sound and logical solutions acceptable by others.
13. Ability to apply patience and ethics during interaction with customers, stakeholders, and coworkers.
14. Monitoring skills and abilities.