

CUSTOMER SERVICES SPECIALIST

Office of the City Treasurer

THE PURPOSE: The purpose of this position is to assist the Customer Services Supervisor in a professional capacity in the performance of various customer service, tax collection, and tax collection system maintenance functions. The Customer Services Specialist serves as the department liaison to outside parties regarding tax account information, escrow agent tax bill requests, and payments on delinquent tax accounts. The Customer Services Specialist also performs supervision duties: supervising temporary personnel during each current tax collection period (December 1 to February 10), the staff performing tasks related to delinquent tax parcel foreclosures, as well as the Customer Services Division staff carrying out day-to-day business when the Customer Services Supervisor is not present.

ESSENTIAL FUNCTIONS:

Tax Collection:

- Serve as the department liaison to outside agencies or individuals who request tax account information available through the Automated Tax Collection System (ATCS), instructing them in the use of the system and answering any inquiries made regarding its use or data.
- Service lending institutions regarding escrow agent bill requests and assist escrow agents in making payments on delinquent tax accounts.
- Prepare combined property tax bills for distribution to requesting escrow agents and owners of multiple properties annually, and perform as an agency for those combined property tax bills requiring special handling.
- Maintain agency master register.
- Research and analyze credit and debit memos received from the lock box agent and prepare the necessary documents and processes through the Cashier System.
- Update and maintain the Worthy Indigent file.
- In the absence of the Customer Services Supervisor: represent the City Treasurer Department at monthly Board of Review meetings and at Common Council hearings on tax-related matters; enter or cancel taxpayer applications for State Lottery and Gaming Credits to the Automated Tax Collection System (ATCS); review and approve installment and delinquent tax bill samples before production runs; and review and approve requests for tax account status changes.

Delinquent Tax Collection:

- Monitor and analyze delinquent real estate property tax accounts and recommend accounts for enforcement action in accordance with City policy.
- Confer with taxpayers and their legal counsel regarding tax account status, payments, complaints, ownership difficulties, and vacated judgments in person, by mail, or via the telephone.
- Monitor enforcement status and account coding for all delinquent tax accounts.

Supervision:

- Supervise the Division's day-to-day operations related to delinquent tax parcel foreclosure files.
- Supervise temporary in-house taxpayer customer service and mail processing operations personnel during each current tax collection period (December 1 to February 10).
- Assist in training division staff in operations, methods, and procedures.
- In the absence of the Customer Services Supervisor, supervise the Customer Services Division, consisting of approximately 25 regular and temporary staff, in performing the following tasks: preparing online property tax, special improvement, and accounts receivable bill statements; processing NSF tax payment check cancellations; ensuring proper recording and reporting of tax-related transactions; maintaining the taxpayer mailing address file; processing all rejected lock box items; researching tax refund checks; maintaining both the special assessments escrow account and the property prepayment account; providing outside parties with tax account and parcel information; mailing documents to delinquent real estate tax accounts slated for legal action; carrying out bankruptcy administration activities; doing tax account coding; managing division records; performing tax remission calculations used in Common Council resolutions; fulfilling the requirements of adopted resolutions; maintaining the Property Tax Installment Payments Direct Debit ACH file; and processing incoming mail.

Additional Duties:

- Compile and maintain Standard Operating Procedures (SOPs) for current job duties of division staff.
- Perform other duties or projects as assigned.

MINIMUM REQUIREMENTS:

1. Bachelor's Degree in Business Administration, Accounting, Finance, or related field from an accredited college or university.
2. Two years of experience in banking or treasury functions or handling high volume customer service inquiries.
NOTE: Equivalent combinations of education and experience may also be considered.
3. Residency in the City of Milwaukee within six months of appointment.

KNOWLEDGE, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS REQUIRED:

- Ability to understand and apply applicable laws, including real estate, property tax, and bankruptcy laws.
- Knowledge of principles and processes of providing excellent customer service, including assessing customer needs, meeting quality standards for services, and evaluating customer satisfaction.
- Ability to effectively supervise and provide guidance to staff members engaged in customer service activities, including assigning and reviewing work; setting priorities, expectations, and deadlines; providing training; addressing employee problems; monitoring employee performance; and giving feedback to employees. Ability to interview and rate job candidates.
- Ability to work easily with all staff levels and to establish relationships with a diverse group of individuals.
- Exceptional ability to communicate verbally with staff, elected officials, taxpayers, business owners, and others.
- Excellent written communication skills: the ability to write clear and concise business letters, memos, forms, reports, Standard Operating Procedures (SOPs), and other documents.
- Ability to read survey maps and plats.
- Knowledge of accounting principles and interest and penalty calculations.
- Knowledge of computerized financial systems.
- Proficiency using spreadsheet, database, and word processing software, such as Microsoft Office (Excel, Access, and Word).
- Ability to accurately do mathematical calculations.
- Ability to effectively set goals, manage multiple priorities, and work within tight time constraints.
- Ability to deal with stress and maintain a positive demeanor in the presence of customers and coworkers alike.
- Honesty and integrity, as well as the expectation that confidentiality will be maintained regarding all personnel, program, and financial matters.

CURRENT SALARY RANGE IS (005): \$45,280.04-\$63,395.54 annually.

06-056 – MMC (SM)

05/19/06

EEO 202