

CITY OF HAMILTON

CORPORATE SERVICES DEPARTMENT
(FINANCIAL SERVICES, TAXATION & CORPORATE CONTROLLER DIVISION - TAXATION SECTION -
LOCATION – 71 MAIN ST. W. 1ST FLOOR)

CUSTOMER SERVICE REPRESENTATIVE – TAXATION – CUPE 5167

SUMMARY OF DUTIES

Reporting to the Manager, Tax Accounting, responsible for providing information by answering and handling all customer service inquiries (verbal or written) transferred over by Customer Service staff. Performs duties associated with the receipt and updating of payments received electronically or by mail. Responsible for online maintenance of the tax roll, ensuring timely update of ownership information, pre-authorized payment plans and financial institution/agent interest. Maintenance and adjustment of tax roll accounts for penalty and interest adjustments and recalculations, correcting misapplied payments, duplicate payments, issuing refunds etc. Liaises with Customer Service staff to provide support, expertise and advice on complex program issues and information on the various tax programs.

GENERAL DUTIES

Receives, assesses and responds to inquiries from staff, financial institutions, law offices, government agencies and the public electronically by e-mail, written or by telephone that cannot otherwise be resolved by Customer Service staff.

Performs online updating through Vailtech database of tax roll information for tax billing purposes such as changes to ownership, mailing/property addresses and banking information. Ensures accurate and timely updates of tax roll information.

Completes various tax balance adjustments in Vailtech, affecting the balances in the tax roll accounts. These adjustments include, but are not limited to, adjustments to correct misapplied payments, penalty and interest adjustments and recalculations, duplicate payments, issuing refunds, etc. Provides written correspondence if required to advise taxpayer of revised tax account balance.

Monitors Pre-Authorized Payment Plan accounts and follows-up on discrepancies such as changes in banking information, returned payments, credits and plan changes; ensures adherence to bank transmission timeframes and billing deadlines.

Monitors the correctness and timeliness of agent electronic listings for those financial institutions or agents remitting tax payment on behalf of their clients. Follows-up on discrepancies and corresponds with the taxpayer and/or agent (through e-mail or letter) to advise them of any concerns / actions required.

Researches information, analyses accounts and composes correspondence in response to account discrepancies from taxpayers, lawyers and financial institutions.

Downloads and processes daily bank transmission of payments, electronic agent listings and post-dated cheques. Verifies balances, posts to Vailtech and journalizes to PeopleSoft. Investigates and rectifies rejected payments.

Receives, reviews and approves forms and supporting documents associated with the City's taxation programs with respect to the five Pre-authorized Tax Payment Plans, Seniors Tax Rebate Program and Low-Income Seniors/Persons with Disability Tax Deferral Program to ensure that all pertinent information has been submitted and all criteria has been met. Notifies applicants (either verbally or in writing) if criteria is not satisfied.

Liaises with Customer Service staff to provide support, guidance, expertise and advise on taxation issues. Provides information on tax policies and procedures, pre-authorized payment plans and provincial/municipal tax programs such as Seniors Tax Rebate Program and the Low-Income Senior or Person with Disability Deferral Program.

Receives, opens, sorts and disburses incoming mail, when required as back up. Batches and records tax payment for distribution to Municipal Service Centres for processing.

Researches returned bills to determine correct mailing address using various online sources.

Receives, researches information and processes requests for tax certificates, income tax letters, tax analysis and confirmation of tax accounts paid for mortgage holders.

Complete, review and mail ownership change letters.

Monitors all group coded tax bills (5 or more accounts to same mailing address) to ensure efficiency, cost savings in postage and good customer service for customers with multiple properties/tax bills. Assists in the mailing and preparation of tax bills and notices.

Maintains paper and electronic filing system of all correspondence including lawyer's letters, program application forms, financial institution/agent billing listings, post-dated cheques, tax remittance stubs and ownership changes.

Provide hands-on training to new employees and students in established procedures and practices; inform them of available services, department policies and procedures, municipal by-laws and provincial legislation.

Work in accordance with the provisions of applicable Health and Safety legislation and all City of Hamilton corporate and departmental policies and procedures related to Occupational Health and Safety.

Perform other duties as assigned and which are directly related to the major responsibilities of the job.

QUALIFICATIONS

1. Previous municipal tax accounting experience related to duties above, normally acquired through a combination of education and relevant experience. A post secondary education in accounting and / or business administration would be an asset.
2. Demonstrated knowledge of business accounting concepts and ability to work with figures and balance daily transactions.
3. Experience in a computerized environment. Proficient working knowledge of Windows Office XP, Microsoft Outlook, PeopleSoft, Word, Excel and database software.
4. Knowledge of Vailtech software would be considered an asset.
5. Ability to conduct internet and intranet searches for information.
6. Excellent interpersonal and conflict resolution skills, demonstrated tact and professionalism in dealing with the public.
7. Ability to communicate effectively and courteously to the public, financial institutions, law offices, elected officials and staff. Must possess good verbal and written communications skills.
8. Demonstrated ability to work independently and in a team environment as well as a demonstrated strong time management and organizational skills.