

CUSTOMER SERVICE SPECIALIST (1229)
Task List (2022)

1. Disseminates information related to City business and user tax and associate permits ordinances, rules, regulations, code, procedures and/or discovery programs to customers by email, at a public counter, virtually (i.e. via Google Meet, Department website, Zoom), and telephonically in order to inform them of tax and permit requirements.
2. Receives, processes and responds to customer inquiries related to billing and resolutions and service requests such as business tax applications, requests for penalty waivers and requests for police/fire/tobacco permits via email, mail, and chat using applications such as LATAX, Tax Deferred Solutions, Front, Virtual Call Center (VCC), and various websites (i.e. Secretary of State website, Board of Equalization website) in order to ensure customers satisfy their tax obligations to the City of Los Angeles and to process items such as applications, change of information requests, penalty waiver requests, renewal forms, and certificates of timely filing
3. Computes and determines various tax liabilities and permits, provides reasoning for calculations, provides information on annual, quarterly and monthly deadlines, and provides compliance requirements to the public using the LA Municipal Code and yearly permit schedules in order to ensure customers satisfy their tax obligations to the City of Los Angeles.
4. Addresses customer questions and concerns, provides clarifying information, and updating accounts as needed via phone, email, Department website chat, and at the front counter in order to provide satisfactory customer service.
5. Provides and explains billing information and tax rates to customers using the current tax rate table, permit schedules, and resources on the Office of Finance website in order to ensure tax payers meet their tax obligations to the City of Los Angeles.
6. Reviews and verifies tax and permit billings by interpreting and applying information/directions within LATAX and internal resources such as informational handouts and training manuals in order to ensure tax payers meet their tax obligations to the City of Los Angeles.
7. Completes amended measures by entering data into the LATAX database and completing and scanning paperwork to a document management system to revise billing discrepancies through LATAX in order to ensure tax payers are billed in accordance with the LA Municipal Code.
8. Collects and processes payments through cash, check, credit and debit card at public counters using LATAX, cash registers, Point-of-Sales devices, and Agent Dashboard in order to receive liabilities owed to the City of Los Angeles.

9. Interacts tactfully with mayoral and council staff when appropriate to address general inquiries related to constituent information, business tax concerns and associated permits using LATAX and Crystal Reports.
10. Provides referrals to supervisors and/or tax payer liaisons as necessary using the Office of Finance website and email to resolve customer inquiries such as California Public Records Act requests.
11. Updates data such as legal names, social security numbers, federal ID numbers, addresses, gross receipts, and start dates on master history file through applications such as LATAX in order to ensure correct information for tax payer accounts.
12. Generates and prints as-needed informational reports through Crystal Reports in order to address general customer inquiries related to business names, start dates, and other related information.
13. Submits requests via email and mail to the Office of Finance audit section or field investigation section to investigate businesses that may be unregistered in order to ensure business are compliant with registration and tax obligations.
14. Inputs data such as tax payer complaint records and online/website system issue records into various charts and spreadsheets using applications such as Excel and Google Docs in order to compile information in a timely fashion.
15. Assists with training of new employees in payment processing, making changes in LATAX, finding pertinent information, and using other Office of Finance applications through the use of training manuals and in person coaching.