



**ADMINISTRATIVE
POLICY**

TITLE: Customer Service		PROCEDURE #: CS-1
DEPT: Department of Assessments and Taxation		DIVISION: All Staff
EFFECTIVE DATE: 6/1/19	REVIEWED: FEP	REVISED: FEP

OBJECTIVE: To establish a procedure to carry out a uniform department wide customer service program.

REFERENCE: Policy #CS-1

APPLICABILITY: All Maryland Department of Assessments and Taxation employees.

DEFINITIONS:

Customers: Anyone who requests or receives a product or service from the Department of Assessments and Taxation.

Customer Service: Efficient, fair, cost effective delivery of products and services to meet the customer’s reasonable expectations and needs.

Complaint: Any written or verbal communication from a customer expressing dissatisfaction with a service provided or action taken by the Department, which is beyond the scope of standard operations or into which further investigation is required. In addition, requests that are out of the ordinary or seek a change in the Department’s services or policies should also be logged.

Resolution: A complaint is considered resolved when the customer understands what action will or will not

be taken; if no action will be taken, the customer will be advised why and what other resources may be available.

Public Record: Information relating to the conduct of the public's business and prepared, owned, used or retained by a public body, regardless of the physical form or characteristics.

COMPONENTS OF THE CUSTOMER SERVICE PROGRAM:

1. The Department of Assessments and Taxation's Customer Service Program Standards
2. Employee Accountability & Program Manager Performance Appraisal
3. Customer Service Tracking (CSTS)
4. Surveys to Measure Customer Satisfaction
5. Employee Appreciation Committee

1. The Department of Assessments and Taxation's Customer Service Program Standards

1.1. All employees shall comply with the Department of Assessments and Taxation's Customer Service Program Standards (the "Standards"). The Standards consist of the following topics (details included in Attachment A):

- 1.1.1. State of Maryland's Customer Service Promise
- 1.1.2. Telephone
- 1.1.3. Voicemail
- 1.1.4. Written Correspondence
- 1.1.5. E-mail

2. Employee Accountability & Department Head Performance Review

2.1. To ensure all employees are complying with the Department of Assessments and Taxation's Customer Service Program Standards, as part of annual and mid-cycle performance evaluations, all employees, including program managers and supervisors, will be evaluated on their handling of customer service issues.

3. Customer Service Tracking

3.1. A Customer Service Tracking System ("CSTS") will assist the Department's Headquarters with the development of a central repository for the logging of customer complaints or inquiries, as well as enable individual programs to set

more customized targets and standards for their customer service.

3.2. The CSTS will facilitate message delegation and routing, as well as allow for the tracking of an inquiry or complaint from the point it is entered into the system up to the point where it is resolved. An inquiry or complaint is considered resolved when the customer understands what action will or will not be taken.

3.3. The primary reporting tool of CSTS is a “gov apps” web-based system, also known as “IQ”.

3.4. Program managers shall direct all employees to keep records of their customer service inquiries and complaints in a way in which they deem acceptable. Program managers will be held responsible for ensuring that customer service requests are being followed through with accordance with Department standards.

3.5. Procedures

3.5.1. Any employee can receive a customer inquiry or complaint and therefore, shall understand this procedure for acting on complaints.

3.5.2. Employees shall resolve inquiries or complaints in a timely fashion, within the time constraints created by their other job responsibilities.

3.5.3. Inquiries and complaints may be received by telephone, e-mail, written letters, or verbal messages.

3.5.4. An employee receiving an inquiry or complaint shall follow through with the request until it is complete, meaning the customer understands what action will or will not be taken. If the request is able to be answered within a normal time frame (varies by request type) then no extra work will need to be done. If the request is atypical, the request must be documented and followed up with.

3.5.4.1. Pertinent call information to be documented includes, but is not limited to: the date, contact information for the customer, what the problem is, when it occurred, and the desired outcome.

3.5.4.2. Notes of the actions taken must contain a chain of steps taken by the employee who opened the case – *i.e.* forwarded this concern to {employee name}; will follow up with {customer name} by X date.

3.5.4.3. Employees shall respond to the customer with an acknowledgement within two (2) business days, and a formal notification of action or status within five (5) business days. If additional time to respond is needed, the customer shall be contacted with an estimated time frame for final response.

3.5.4.4. Complaints from the public regarding the Department of Assessments and Taxation’s services, programs, policies or employee conduct shall be documented and shared with the appropriate office.

3.5.4.5. Complaints regarding the conduct of employees shall be assigned to Human Resources for appropriate action.

3.5.4.6. Inquiries or complaints that cannot be answered by the employee’s office shall be forwarded to the designated “help” email box for review, prioritization, and assignment for follow-up, if necessary. This email box is sdat.411@maryland.gov.

3.5.4.7. The resolution of the customer inquiry or complaint shall be communicated to the customer indicating what action will or will not be taken and when the action will be implemented, if applicable.

3.5.4.8. The records of customer inquiry or complaints shall be retained per any applicable statutory and regulatory guidelines. All records retained in the CSTS system are public records subject to disclosure unless expressly exempted from disclosure by state or federal law.

3.5.4.9. The status of customer complaints shall be reviewed by program managers, supervisors and directors as part of the customer service review process.

4. Surveys to Measure Customer Satisfaction

4.1. Feedback from customers on their perception of the Department of Assessments and Taxation’s quality of service is crucial in the development of excellent customer service. There are two main ways that customers can provide feedback about the service they received from the Department:

4.1.1. Physical Customer Service Cards

4.1.1.1. The Department of Assessments and Taxation has physical customer service cards at all local assessment offices and both public counters at Headquarters. Immediately after receiving a service and interacting with the Department, customers can share their thoughts on a physical

card. Each completed card is then sent to Headquarters, where the contents are logged in a spreadsheet. If an employee receives a positive comment, they receive a printed “shout-out” card acknowledging their great work. If the customer has a negative experience, the matter is logged and investigated as soon as is reasonably practicable.

4.1.2. Governor’s Customer Service Survey

4.1.2.1. The Governor’s Office of Performance Improvement created an online survey for each individual agency / department in the State of Maryland. [SDAT’s online survey](#) is predominantly displayed on our homepage and throughout the website. Once customers take the online survey, the results generate into a spreadsheet. If an employee receives a positive comment, they receive a printed “shout-out” card acknowledging their great work. If the customer has a negative experience, the matter is logged and investigated as soon as is reasonably practicable.

4.2. Program managers shall continually conduct analysis of the survey data, create necessary action plans to address deficiencies, and present this information to the Director’s Office for approval.

4.3. The survey reports will be used to measure changes in customer satisfaction levels.

5. Employee Appreciation Committee

5.1. The Department’s Employee Appreciation Committee was created to motivate and recognize employees who meet and exceed customer standards.

5.2. The members of the Employee Appreciation Committee include a representative from Taxpayer Services, Real Property, Office of Information Technology, Human Resources, Office of the Director, and the Public Information Officer.

5.3. The Employee Appreciation Committee shall meet every other month.

5.4. The Employee Appreciation Committee has several ways of recognizing the outstanding efforts of employees:

5.1.1. Monthly Newsletter

All positive shout outs received by employees are logged and included in the monthly newsletter that is distributed internally.

5.1.2. Employee of the Month Program

Every month, employees may submit a nomination for a fellow employee that they believe has gone above and beyond in adhering to the State of Maryland's Customer Service Promise. The Department's Executive Team then votes to select the winner. The monthly winner is presented with a certificate by their Supervisor and is included in the monthly newsletter.

5.1.3. Governor's Citation

When applicable, the Department of Assessments and Taxation will nominate an employee to receive a Governor's Citation, which are presented by the Director and other leaders in state government in conjunction with various events such as cabinet meetings.

6. Ongoing Training

- 6.1. Ongoing training in customer service is necessary to establish awareness of the program expectations and update the Department's employees on any changes. At a minimum, training and education of employees in the Department's Customer Service Standards shall be provided by the Human Resources Department at New Employee Orientation and continuously throughout the year.

ATTACHMENT A

The Department of Assessments and Taxation's Customer Service Standards



CUSTOMER SERVICE STANDARDS

The Department of Assessments and Taxation is committed to providing the best possible customer service to citizens through all forms of communication, and pledges to adhere to the State of Maryland's Customer Service Promise. The State of Maryland pledges to provide constituents, businesses, customers, and stakeholders with services in the following manner:

- **Friendly and Courteous:** We will be helpful and supportive and have a positive attitude and passion for what we do.
- **Timely and Responsive:** We will be proactive, take initiative, and anticipate your needs.
- **Accurate and Consistent:** We will always aim for 100% accuracy, and be consistent in how we interpret and implement state policies and procedures.
- **Accessible and Convenient:** We will continue to simplify and improve access to information and resources.
- **Truthful and Transparent:** We will advance a culture of honesty, clarity and trust.

Modes of Communication with Customers

Telephone

- At the Department of Assessments and Taxation's Headquarters, the main telephone number shall be answered during business hours 8:30 AM to 4:30 PM. At the local assessment offices, the main telephone number shall be answered during business hours from 8:00 AM to 4:30 PM.
- Telephones shall be answered promptly, courteously and professionally.
- All calls, from both internal, and external sources, shall be answered with a consistent greeting such as "You have reached the Maryland Department of Assessments and Taxation, this is (insert name), how may I help you?"
- Telephone calls shall be answered in the order received. Callers may be given the option to be put on hold or called back; a customer will never be asked to call the Department of Assessments and Taxation back. Protocol is to ask for the customer's contact information and to call them back once their inquiry or complaint is resolved.
- If a caller wishes to stay on the line and is holding for an extended period of time, the employee shall provide regular updates.
- After the caller has finished speaking, staff will paraphrase what was said to ensure the request is understood (e.g., "Let me make sure I understand your question/concern" and then restate what they've said).

- If the employee the customer is trying to contact is not available, staff will provide caller the option to be transferred to that employee's voicemail. If it is an emergency, the caller will be directed to another employee who can provide immediate assistance.
- If the information being provided to the customer can also be found on our website, after you have given them the correct information, let them know for future reference this can also be found online and provide the exact webpage where the information may be located.
- Before and while transferring calls, the following steps should be taken:
 - The nature of the call shall be understood;
 - Callers will be informed to whom they are being transferred;
 - Callers will be provided the name, phone number, and division/program to which they are being transferred;
 - The person transferring the call will, whenever practical, wait for the call to be answered, announce who is being transferred and provide a brief description of the caller's request; and
 - If a call is received during interdepartmental coverage and the employee answering the call cannot answer the question, the employee shall explain they are covering for a different department/program and offer to take a message, transfer the call to voicemail, or send an email.

Voicemail

- The greeting of an outgoing voicemail message shall include the full name of the employee, the program name, frequency with which messages will be checked, and a provision for contacting another employee in person.
- Voicemails received from callers shall be acknowledged within a 24-hour period or within the next business day.
- Carefully evaluate the content of all pre-recorded messages to ensure that you state the most important information first and in a timely manner.
- If you are going to be out of the office, please record a new message on your voicemail stating the dates you will be unavailable, the date you will return to the office, and alternate employee with their contact information.
- If you are away from the office for an extended period of time, establish a backup

system for checking your messages. If necessary, forward your calls to another employee who is in the office.

- Voicemail messages/greetings for general and shared (non-personal) voicemail boxes and splits may only be changed with supervisory approval.

Written Correspondence

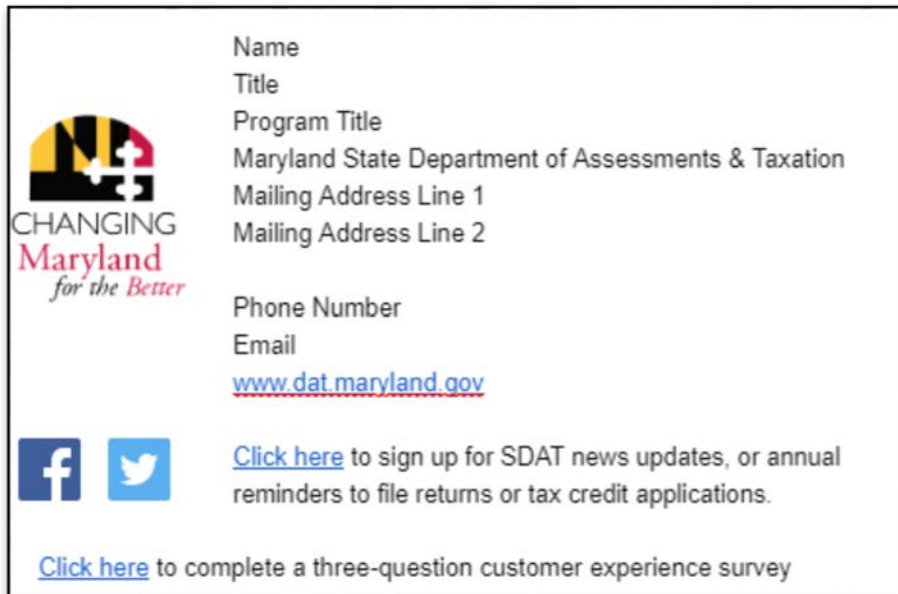
This section pertains to physical letters and faxes. Please note that employees should contact a customer using e-mail whenever possible to ensure they receive a timely response.

- The Department of Assessments and Taxation shall develop templates for written communications with the public.
- The Department of Assessments and Taxation's Public Information Officer will periodically update and distribute the templates that should be used when corresponding with customers.
- Written correspondence should be complete, accurate, and precise with a respectful and professional tone. Use spell check and proofread before sending.
- Written correspondence shall be drafted within three (3) business days of the receipt of the customer inquiry or complaint. The final correspondence shall be emailed or mailed within 5 business days of the receipt of the customer inquiry or complaint.

E-mails

- Respond to e-mails within one (1) business day of receipt of the email.
- Put the appropriate subject issue in the SUBJECT line. Do not leave the subject line blank.
- Introduce yourself, i.e. "My name is (insert name) and I am the (insert title) for the Maryland Department of Assessments and Taxation."
- Thank the customer for contacting your office.
- Restate all or part of the question or inquiry in your response.
- Close the email with a follow-up date (if applicable) or refer the customer to our website if the information they are requesting can be found on the website. Reference to the website is in addition to, not in place of, information you have provided in your response. Do not solely refer people to our website, you must type the information in your response and then share the link/webpage.

- E-mail correspondence should be complete, accurate, and precise with a respectful and professional tone. Use spell check and proofread before sending.
- The Department of Assessments and Taxation’s Public Information Officer should periodically update and distribute the instructions for setting the Department’s standard email signature. An employee’s signature should contain the following:
 - Your name
 - Position Title
 - Program title



- Maryland Department of Assessments and Taxation
 - Mailing Address
 - Phone and e-mail address.
 - Website
 - [Click here](#) to sign up for SDAT news updates, or annual reminders to file returns or tax credit applications.
 - [Click here](#) to complete a three-question customer experience survey
 - The Facebook, Twitter, and “Changing Maryland for the Better” icons.
- Please do not include any extraneous quotes, photos, emojis, fonts, or colors that are not seen in the approved template.
 - Use discretion when responding to group emails. Some individuals who are copied along with an original e-mail recipient may not want to be involved in an ongoing e-mail dialogue.
 - If you will be away from the office, please create an “Out of the Office” message in G-mail to respond to incoming emails with information of your absence, return date, and alternate contact person.