
DEPARTMENT:

Finance

SUPERVISED BY:

Customer Account Supervisor

FLSA STATUS:

Non-Exempt

JOB SUMMARY:

The Account Specialist (AS) is a customer-focused professional who provides customer service and account management for District customers. They are competent to perform across the full range of customer account functions within the department. An employee in this position is able to perform all parts of their assigned function, is expected to exercise initiative in solving routine to moderate problems and is able to perform several tasks normally assigned to others in the department on an as-needed basis. Basic knowledge of District operations, as well as general knowledge of basic accounting and office procedures, is required.

DISTINGUISHING FEATURES:

This is the second of a two-level series. The AS will be assigned to perform all tasks in designated areas in customer account functions with minimal supervision, using established and documented procedures. The position provides high levels of customer service. The AS works under the supervision of the Customer Account Supervisor. Work is typically regular and recurring. Results of their work may impact multiple systems within the department, other employees, customers and stakeholders. Final work products are reviewed for accuracy and completeness by the Customer Account Supervisor. The Account Specialist position is distinguished from the Assistant Account Specialist position by critical thinking skills, analytical skills, more complex levels of work performed, and overall job knowledge required for resolving account discrepancies and researching complex issues.

MINIMUM QUALIFICATIONS:

- Listening, speaking and writing effectively with diverse audiences, so others gain understanding, conveying subtleties effectively to the audience in oral, written and electronic formats.
- Efficiently and effectively identifying and meeting the needs of customers, providing professional customer service in varied situations and circumstances.
- Cash receipt and reconciliation skills.
- Experience and general understanding of typical customer service functions including Utility Billing, Account Maintenance, and Automated Payments.
- Demonstrated proficiency in 10-key by touch, computer typing skills of 35 wpm minimum and Microsoft Suite of products (e.g. Word, Excel).
- Knowledge of computer accounting, billing, payment and software systems (e.g. Springbrook) and phone system.
- Knowledge of past due and delinquent account collections processes, including liens, bankruptcies, foreclosures and refunds.
- Ability to understand and follow directions, effectively adjust to changing priorities, problem solve and multi-task, be decisive in taking actions and making decisions.
- Ability to effectively communicate with the public, co-workers, supervisors and subordinates.
- Ability to maintain a professional and respectful working environment.
- English language usage, oral and written, including spelling, grammar and punctuation.
- Consistent attention to detail.

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EDUCATION & EXPERIENCE:

Any combination of education, training and experience that provides the requisite knowledge, skills and abilities to successfully perform the duties and fulfill the responsibilities of the position. A typical way to achieve that would be:

- High school diploma or GED
- Two years of post-secondary coursework in accounting or bookkeeping preferred
- Three years of work experience in an office, finance or accounting environment
- Three years of work experience providing telephone customer service support

WORKING CONDITIONS:

Typical office environment. Requires strength and mobility, including prolonged sitting and use of computer. Corrected vision sufficient for use of computers.

TYPICAL DUTIES & RESPONSIBILITIES:

The duties listed below, while not all-inclusive, are characteristic of the type and level of work associated with this position. Individual positions may perform all or some combination of the duties listed below, as well as other related duties. The District reserves the right to add, modify or remove duties as appropriate to meet business needs.

Customer Account Activities. Provide professional customer service support to ratepayers, vendors and stakeholders; answer, research and respond to requests for account information including set-up, updating/maintaining an account, balance reconciliation, adjusting/correcting a balance, and payment processing; provide help desk support to ratepayers on automated payment processes; support rate program enrollment or verification. Generate utility billing and past due notices; process account write-offs, refunds, and adjustments; support phone queue; issue side sewer permits; receipt/batch daily cash, checks, credit card payments including lockbox and ACH payments.

Financial Transactions/Activities. Support the Accounting team on various finance activities on an as needed basis related to cash reconciliations daily/monthly, utility account refunds, and various payment system coordination/reconciliations. Reconcile various receivables subledgers to the general ledger and draft/manage long-term contracts for past due accounts and utility customers connecting to public sewer. Provide SAO audit support as needed. Perform software (e.g. Springbrook, Civic Pay, etc.) upgrade testing.

Reporting. Typical tasks: Assists Customer Account Supervisor with accumulating and consolidating data for various fiscal and budget reports and projections, including CAFR preparation support (including statistics and supplemental schedule information) and District budget preparation support (providing account, rate and revenue information).

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Gives information and solves most problems concerning their functional area that may include collections, special projects and other information needed by internal or external customers, agencies or vendors. With guidance, may handle more complex and non-routine determinations and computations using established rules, regulations and policies.

RELATIONSHIP WITH OTHERS:

The Account Specialist has regular telephone or in-person contact with employees of other departments, external agencies, customers or vendors to exchange information. Contact with external customers typically involves clarifying information, resolving discrepancies, customer web interface help desk functions or explaining District accounting procedures or policies. Communication may be both oral and written.

SUPERVISION:

Exercised: May provide limited review and support to Assistant Account Specialist.

Received: The Account Specialist works under the direction and supervision of the Customer Account Supervisor, including assigning day-to-day work activities, goal setting and performance management. Assignments may vary given workload and business needs or as requested by the Customer Account Supervisor. New or unusual assignments or situations receive guidance from the Customer Account Supervisor. Guidance is communicated orally and/or in writing, and results are reviewed for accuracy and to ensure use of proper methods. Procedures and accepted practices govern most regular recurring activities.

Special Requirements:

- To ensure the successful operations of District business, this position requires English language proficiency in written and oral form.
- Possess and maintain a valid driver’s license with a good driving record.
- May be required to procure and maintain a surety bond for the faithful performance of job duties and to account for all moneys coming into the employee’s hands.