
DEPARTMENT:

Finance

SUPERVISED BY:

Customer Account Supervisor

FLSA STATUS:

Non-Exempt

JOB SUMMARY:

The Assistant Account Specialist (AAS) is a customer-focused professional who provides customer service and assistance to District customers and visitors. This individual is the first point of contact, welcoming and presenting the District in a professional and customer-focused manner. They are responsible for performing customer service, account assistance and office support work within the Finance Department, including phone and walk-in customer service, telephone switchboard operations, data entry, payment receipt and processing, and residential rate programs.

DISTINGUISHING FEATURES:

This position is the first of two in the Account Specialist series of positions within the Finance Department. The position requires initiative in carrying out recurring and routine assignments independently. These tasks require accuracy and consistent application of procedures, as well as the ability to provide superior customer service and assistance in person and on the telephone. Work requires some knowledge of finance and office procedures and is typically document oriented. The AAS works under close supervision and operates from specific and defined direction and instruction, including established, well-known procedures and/or specific instructions when assigned new or non-routine tasks. Work products are reviewed for thoroughness, accuracy and conformance to established policies and procedures.

MINIMUM QUALIFICATIONS:

- Listening, speaking, writing, and signaling 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, 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).
- Good telephone switchboard skills.
- Ability to understand and follow directions, effectively adjust to changing priorities, problem solve, and be decisive in taking actions and making decisions.
- Ability to effectively communicate with customers, team members and stakeholders.
- 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
- One year of work experience in an office, finance or accounting environment, performing data entry, clerical tasks and telephone customer service support

WORKING CONDITIONS:

Typical office environment. Requires strength and mobility, including prolonged sitting and use of a 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 Service/Assistance. Greets and welcomes all visitors and customers at the District. Responds to general, routine inquiries from customers regarding District utility billing-related information, accounts and services, including compliance with District Code, processes, procedures, account balances, service requests and similar information. Receives walk-in payments, directs calls and requests for other support services. Escalates complex inquiries or customer issues to other members of the Customer Account team.

Clerical/Data Entry. Manages CivicPay/Selectron web/IVR processing/posting payments to customer accounts, investigates invalid addresses and other inaccurate customer information pertinent to billing and makes necessary corrections. Posts NSF charges to customer accounts for returned checks. Manages Direct Debit payments program. Manages all District customer email and voicemail boxes and distributes messages to internal staff for follow-up. Prepares new owner changes/letters, including closing bills to former owners, and does general data clean-up when noted. Manages Bill Tenant Directly (BTD) forms/process, setting up new tenants and/or placing bill in owner name. Provides title company support with WebCheck and owner clean-up support. Supports residential rate programs including low-income senior discount customer enrollment and extended vacancy credit application review and processing.

Miscellaneous/Other. Provides a variety of support functions within the Finance department as needed, including but not limited to AM/PM office opening/closing, and special projects. Actual assignments may vary according to workload and business needs or as requested by the Finance Department management.

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RELATIONSHIP WITH OTHERS:

The AAS has regular telephone and in-person contact with external customers, visitors and stakeholders, and with employees, both within the department and with other District departments.

SUPERVISION:

Exercised: Not Applicable

Received:

The Assistant 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 the 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.