
DEPARTMENT:

Finance

SUPERVISED BY:

Customer Account Supervisor

FLSA STATUS:

Non-Exempt

JOB SUMMARY:

The Account Specialist (AS) is a customer-focused professional who provides high levels of customer service and account management for District customers. The AS provides assistance to internal and external customers, troubleshoots and resolves routine to moderately complex and technical billing issues, assists with customer messaging and communication, and performs a variety of utility billing and accounting tasks. The AS is cross-trained and competent to perform across the full range of customer account functions.

DISTINGUISHING FEATURES:

This is the second journey-level position in the Account Specialist classification series. The AS is skilled and able to perform the full range of semi-professional tasks independently, with minimal supervision. Work is typically regular and recurring, following established and documented procedures and requires independent judgment to analyze and resolve basic to moderately complex problems. The AS work impacts multiple business systems, customers, and stakeholders. The AS is distinguished from the Assistant Account Specialist position by the level of experience, overall job knowledge and skills, the complexity of work performed, and the degree of independence.

MINIMUM QUALIFICATIONS:

Knowledge of:

- Customer service and billing principles, practices, and methods.
- Credit and collection procedures, laws and regulations.
- Basic accounting and bookkeeping methods, standards and procedures.
- Federal, state and local laws related to utility billing and consumer information.

Skill in:

- Providing professional customer service in varied situations and circumstances.
- Answering, analyzing and resolving customer inquiries.
- Processing and analyzing data and information accurately with close attention to detail.
- Use of a personal computer, including Microsoft Office suite, for word processing, spreadsheets, calendar management, messaging, and online meeting systems.
- Use of comprehensive, computer-based accounting, billing, payment and phone systems.
- Keyboarding and 10-key by touch at a speed necessary for successful job performance (35 wpm).
- Tabulating, recording, and balancing transactions.
- Cash receipt and reconciliation.

Ability to:

- Make accurate arithmetic and financial computations and use mathematical reasoning.

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- Accurately code, record, and balance financial transactions.
- Understand and follow directions, effectively adjust to changing priorities, problem solve and multi-task, and be decisive in taking actions and making decisions.
- Listen, speak and write professionally and effectively with diverse audiences so others gain understanding.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Work independently and effectively as part of a team to deliver the work.
- Be assertive and ask for clarifying information and instruction when necessary.
- Identify, collect, and electronically document and maintain accurate, clear, and concise data and records.
- Maintain organized documents and files in electronic and physical format.
- Exercise independent judgment within general policy, procedural, and legal guidelines.
- Maintain a professional and respectful working environment.
- Effectively use standard business English, oral and written, including spelling, grammar and punctuation.
- Be dependable and punctual in reporting to work as scheduled.
- Pass all required health and safety training and apply the procedures and concepts to the work environment.

Certification & Licensure:

- Licensed Notary Public in the State of Washington, depending on assignment.

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.
- Post-secondary coursework or specialized training in accounting, bookkeeping or utility billing.
- Three (3) years of accounting, bookkeeping, utility billing or related work experience, preferably in a utility or government environment.
- Three (3) years of customer service work experience, including contact with the general public and cash handling.

WORKING CONDITIONS:

The position performs work indoors in an office environment, requiring strength and mobility for this setting, including prolonged sitting and use of a computer. Must be able to occasionally lift and carry up to 25 lbs safely. Corrected vision sufficient for use of computers.

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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 Accounts & Utility Billing. Provide professional customer service support to ratepayers, vendors and stakeholders. Answer phone and email, 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. Answer customer phone calls in the billing phone queue as part of queue rotation. Issue side sewer permits. Receipt/batch daily cash, checks, and credit card payments, including lockbox and ACH payments.

Finance & Accounting. Perform various finance and accounting activities as needed, including balancing or processing cash receipts, account billings and utility account refunds. Reconcile and balance subsidiary ledgers, analyze and adjust accounts and ledgers as appropriate. Draft and manage long-term contracts for past due accounts and utility customers connecting to public sewer. Perform data queries and develop information for reports as needed. Maintain information and review financial transactions by creating and/or monitoring electronic files and/or accounting documents and spreadsheets. Maintain accounting controls and financial security by following policies, procedures, and internal controls. Perform non-routine duties associated with the reconciliation, balance or process cash receipts, bank deposits, account billings, and bank statements.

Other Duties. Handle confidential and sensitive information with discretion. Develop and review functional documentation and procedures for business processes and applications. May perform more complex and non-routine determinations and computations using established rules, regulations and policies. Operate modern office equipment. Follow and comply with District policies, practices, procedures and management directives. Follow occupational health and safety policies and procedures. Demonstrate regular and reliable attendance. Perform other duties as assigned.

RELATIONSHIP WITH OTHERS:

The AS has regular telephone, written and in-person contact with District staff, external agencies, customers and vendors, and the general public for the purposes of information sharing, explaining policies and procedures, work coordination, and problem-solving.

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SUPERVISION:

Exercised: Does not provide direct supervision, may provide limited technical direction to and review the work of the Assistant Account Specialist.

Received: This position works under the direction and supervision of the Supervisor and may receive task direction from the Senior Account Specialist. Work is reviewed regularly for accuracy, quality and compliance with applicable laws, regulations, policies and procedures. Direction is received through formal and informal communications, conferences, and meetings. A formal evaluation of the employee's performance and work is conducted at least annually through the performance appraisal process.

SPECIAL REQUIREMENTS:

- Subject to pre-employment skills testing.
- English language proficiency in written and oral form.
- Spoken language skills (e.g. Russian, Spanish) desired.
- Required to work the normal working hours as defined for the position.
- Final offer of employment is contingent upon successful completion of a reference check.