



## Senior Accounting/Customer Service Representative

### ***Purpose of the role:***

Under direction, positions may be assigned to either the City Manager's Office or the Finance Department. In the City Manager's Office, serves as the first point of citizen contact and is expected to provide extraordinary customer service handling issues with tact and diplomacy. In the Finance Department, leads, oversees and participates in more complex and difficult work of staff responsible for performing efficient customer service functions; provides information, researches problems, performs billing and collections, receives payments and issues licenses and permits; handles the more difficult customer service problems; performs a variety of technical tasks relative to assigned areas of responsibility; and performs related duties as assigned.

### ***Distinguishing Characteristics:***

This is the lead level in the Accounting/Customer Service Representative series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed and the complexity of duties assigned including providing lead supervision to assigned staff, overseeing day-to-day activities, and participating in developing goals and objectives. Employees perform the most difficult and responsible types of duties assigned to classes within this series including the more difficult or sensitive customer service problems. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility.

***The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.***

### ***Essential Duties and Responsibilities:***

- Leads, plans, trains, and reviews the work of staff responsible for performing efficient customer services functions; participates in performing the most complex work of the unit including the more difficult or sensitive customer service problems.
- Trains assigned employees in their areas of work including efficient and effective customer service methods, procedures, and techniques.
- Verifies the work of assigned employees for accuracy, proper work methods, techniques, and compliance with applicable standards and specifications; ensures adherence to safe work practices and procedures.
- Performs the more technical and complex tasks of the work unit including handling the most difficult customer relations situations involving upset and dissatisfied customers; responds to complaints from customers and the public, takes action to resolve the complaint, responds and monitors staff responses to correspondence and telephone calls.

- Oversees and performs the more difficult tasks associated with issuing and collecting billings for the City's water utility services; reviews and audits adjustments to customer accounts; reviews, researches and resolves problems identified on tentative billings; releases and generates such billings to be mailed to customers.
- Monitors the collections of utility billings; reviews periodic reports of delinquent water service accounts; contacts customers regarding delinquent accounts, NSF checks and deposits; assists staff in collections activities; recommends and/or takes action on delinquent accounts, including placements of liens or working out payment plans.
- Researches and assembles information from a variety of sources for preparation of records and reports; makes arithmetic or statistical calculations; organizes and maintains office files, conducts special studies and recommends organizational, procedural and other changes.
- Performs routine cashiering functions; verifies cash receipts and prepares bank deposits.
- Performs related duties as required.

*The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.*

Knowledge of:

- Operations, services, and activities of a customer service program.
- Principles of lead supervision and training.
- Methods and techniques of office administration.
- Principles and practices of customer service.
- Principles and practices of sound business communication.
- City organization, ordinances, rules, policies, procedures.
- Methods and techniques of proper phone etiquette.
- English usage, spelling, grammar, and punctuation.
- Basic data processing, bookkeeping and record keeping practices and procedures.
- Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
- Pertinent federal, state, and local laws, codes, and regulations.

***Desired  
Minimum  
Qualifications:***

Ability to:

- Lead, organize, and review the work of staff.
- Independently perform the most difficult customer service duties.
- Understand the organization and operation of the City and of outside agencies as necessary to assume assigned responsibilities.
- Interpret, explain, and enforce department policies and procedures.
- Interpret, explain and apply complex City and state laws and regulations related to area of assignment.
- Read and interpret complex data and information.
- Use math and mathematical reasoning.

- Analyze and solve problems.
- Observe and interpret situations.
- Learn and apply new information.
- Tactfully and effectively handle sensitive customer relations situations and defuse situations that are highly emotional and volatile.
- Use tact, discretion, patience and understanding in dealing with customers and the public.
- Prepare clear, accurate and concise records, reports and basic correspondence.
- Organize, set priorities and exercise sound judgment.
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
- Work independently in the absence of supervision.
- Understand and carry out written and oral instructions.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Respond and perform assigned duties in the event of a City-declared emergency.

**Competencies:**

- Results Oriented
- Customer-Focused
- Flexible/Adaptable
- Problem Solver and Decision Maker
- Planner and Organizer
- Technically Knowledgeable

*Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

**Education and  
Experience  
Guidelines:**

**Education:**

Equivalent to the completion of the twelfth grade.

**Experience:**

Four years of increasingly responsible customer service experience.

**Licenses; Certificates; Special Requirements:**

A valid Class C California driver's license is required.

*The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

**Physical and  
Environmental  
Conditions:**

**Physical:** Sufficient physical ability to work in an office setting; sit, stand, walk, reach, twist, turn, kneel, bend, squat, and/or stoop for prolonged periods of time; perform duties requiring grasping, repetitive hand movement, and fine coordination; operate office equipment; and communicate verbally in person and by phone. **Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate office equipment. **Hearing:** Hear in the normal audio range with or without correction.

**Environment:** Standard office setting; frequent interaction with City staff and the general public; work with frequent interruptions, intense and changing deadlines, and potentially hostile situations.

*Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not include all** duties performed by individuals within a classification. In addition, specifications are intended to outline the **minimum** qualifications necessary for entry into the class and do not necessarily convey the final qualifications of incumbents within the position.*

*Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.*

Date Adopted: 7/5/03

Date Revised: