



Title: Customer Service Representative II (Finance)

FLSA Status: (Non-Exempt)

BRIEF DESCRIPTION:

The purpose of this position is to provide service to both internal and external customers by performing specialized clerical work and offering technical level assistance covering a broad knowledge base using problem solving and decision-making skills over the phone, internet or in person. This may be accomplished by processing applications for a business license or various City services, maintaining account information, posting payments and creating bills or collection statements. Other duties may include completing related tasks as assigned.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

(S) Sedentary	(L) Light	(M) Medium	(H) Heavy	(V) Very Heavy
Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree.	Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly.	Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly.	Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly.

#	Code	Essential Functions
1	S	Accepts applications for utility accounts, hydrant accounts and business license over the phone, internet, or in person; checks application and/or agreement for accuracy, verifies registration, and enters information into the appropriate system.
2	S	Responds to and resolves customer's complex questions regarding water, sewer, solid waste, business licensing, privilege tax and utility issues; assists customers at a public counter, email and/or by telephone.
3	S	Responds to and resolves general inquires and complaints form citizens and other agencies regarding charges, delinquencies, refunds and services; responds to complaint calls relating to policies or procedures. Creates and sends notifications to customers.
4	S	Researches and prepares leak, sewer fee appeal and winter visitor adjustments to accounts for incorrect billings, notes accounts in the appropriate system.



5	S	Receives payments from the public for a variety of City services through the mail, on the phone and in person; checks payments for accuracy and balance payments to appropriate system reports.
6	S	Processes bank deposits for city departments including transit, and public safety.
7	S	Generate copies of customer utility bills, collection letters and sales tax account statements upon the customer's request.
8	S	Prepares and processes service orders for various City services including, but not limited to water turn-ons and turn-off requests, meter re-reads, solid waste requests, reports of leaks or water outage, etc.
9	S	Analyzes accounts to determine next action such as payment arrangements, failure to meet payment arrangements (FMPA), waiving fees, adjustment requests, creating and sending notices to customers for various reasons.
10	S	Under guidance, completes system testing and training as requested.



JOB REQUIREMENTS:

-Description of Minimum Job Requirements	
Experience	1-2 years experience. Moderate previous experience required in the same or similar previous positions. The job requires a good working knowledge of common and uncommon techniques, methods, practices, procedures, use of forms, routines, etc., of a moderate to complex nature.
Education	High school or equivalent.
Technical Skill	Skilled technical skills. Work requires predominately routine and some non-routine technical skills. Requiring practical knowledge of a technical field with use of judgment and decision-making abilities appropriate to the work environment to the organization.
Physical Demands	Work requires light or low amount of physical exertion. The job requirements for manual dexterity or physical manipulation are limited. The need for physical stamina and endurance is of minimal or low significance. The degree of physical strain produced on the job is somewhat taxing, but does not usually produce fatigue and require periods of rest. Freedom of movement exists, and the job does not confine the employee to a prescribed body posture. Body movement usually involves sitting and intermittent walking.
Contacts	Contacts are an integral part of the job as work involves internal and external contacts for the purpose of problem-solving with respect to matters of considerable importance to the organization requiring tact, diplomacy and persuasiveness and/or where no guidelines exist. Improper handling could affect relationships between departments or functions. Contacts are frequently at the same or higher levels. Interactions may affect City business. Work involves regular contact with people who are upset, uncooperative or have difficulty communicating their requirements and/or a regular requirement to communicate information that people do not want to hear or find upsetting.
Responsibility	May show another employee how to perform a task or may have some lead authority over one or more people for a short period of time through the year. May train replacement and/or co-worker in own job functions.
Accountability	Decision/action situations have a moderate impact on the organization. Errors are usually detected after the fact and may result in significant interruption and delay in work output and may have a moderate impact on resources within a department. Errors may have an impact on other departments and external relationships.
Environment	No adverse environmental conditions, pleasant surroundings.
Safety	Work involves few, if any; duties that if incorrectly performed could present a safety risk to others.
Reading	Intermediate - Ability to read papers, periodicals, journals, manuals, dictionaries, thesauruses, and encyclopedias. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.
Math	Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.
Writing	Intermediate – Ability to write reports, prepare business letters, expositions, and summaries with proper format punctuation, spelling and grammar, using all parts of speech. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.
Certifications & Other Requirements	None



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with “S”				
Sedentary	Light	Medium	Heavy	Very Heavy
Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly.	Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C Continuously 2/3 or more of the time.	F Frequently From 1/3 to 2/3 of the time.	O Occasionally Up to 1/3 of the time.	R Rarely Less than 1 hour per week.	N Never Never occurs.
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Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

-Physical Demand-	-Frequency-	-Brief Description-
Standing	O	Observing work site, observing work duties, communicating with co-workers
Sitting	F	Desk work, meetings, driving
Walking	O	To other departments/offices, around work site
Lifting	R	Supplies, files
Carrying	R	Supplies, files
Pushing/Pulling	O	File drawers, tables and chairs
Reaching	R	For supplies, for files
Handling	C	Paperwork
Fine Dexterity	C	Computer keyboard, telephone keypad, calculator
Kneeling	R	Filing in lower drawers, retrieving items from lower shelves/ground
Crouching	R	Filing in lower drawers, retrieving items from lower shelves/ground
Crawling	N	Under equipment
Bending	R	Filing in lower drawers, retrieving items from lower shelves/ground
Twisting	R	From computer to telephone
Climbing	R	Stairs, step stools
Balancing	R	On step stools
Vision	C	Reading, computer screen, driving
Hearing	C	Communicating via telephone/radio, to co-workers/public
Talking	C	Communicating via telephone/radio, to co-workers/public
Foot Controls	N	Driving
Other (specified if applicable)		



MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Standard office equipment, Microsoft Office, Harris System, Permits Plus, Hansen, MCARE, GIS, and Assessor Website.

ENVIRONMENTAL FACTORS:

C Continuously	F Frequently	O Occasionally	R Rarely	N Never		D Daily	W Several Times per Week	M Several Times per Month	S Seasonally	N Never
-Health and Safety Factors-						-Environmental Factors-				
Mechanical Hazards			N			Respiratory Hazards			N	
Chemical Hazards			N			Extreme Temperatures			N	
Electrical Hazards			N			Noise and Vibration			D	
Fire Hazards			N			Wetness/Humidity			N	
Explosives			N			Physical Hazards			N	
Communicable Diseases			R							
Physical Danger or Abuse			R							
Other										

PROTECTIVE EQUIPMENT REQUIRED:

None

NON-PHYSICAL DEMANDS:

F Frequently From 1/3 to 2/3 of the time	O Occasionally Up to 1/3 of the time	R Rarely Less than 1 hour per week	N Never Never occurs
-Description of Non-Physical Demands-			-Frequency-
Time Pressure			O
Emergency Situation			R
Frequent Change of Tasks			F
Irregular Work Schedule/Overtime			R
Performing Multiple Tasks Simultaneously			F
Working Closely with Others as Part of a Team			F
Tedious or Exacting Work			F
Noisy/Distracting Environment			F
Other			

PRIMARY WORK LOCATION:

Office Environment	X	Vehicle	
Warehouse		Outdoors	
Shop		Other	
Recreation/Neighborhood Center			