

## Class Title: Account Representative

### **BRIEF DESCRIPTION OF THE CLASSIFICATION:**

Performs customer service, billing and collections operations for city-wide customer accounts. Duties include responding to customer inquiries over the telephone, in person, mail and via the City’s internet site; assisting customers with establishing/disconnecting services; reviewing and updating account information; researching bill concerns and developing payment plans.

### **ESSENTIAL FUNCTIONS:**

*This information is intended to be descriptive of the key responsibilities of the classification. The following examples do not identify all duties performed by any single incumbent. Specific requirements of individual positions are described in the Job Description.*

Physical Strength Code	ESSENTIAL FUNCTION
1 S	Provides assistance to customers via telephone in a call center environment, in person at a customer service lobby, and through computer emails. Maintains, establishes and terminates customer accounts by verifying and updating information and filing essential documents. Responds to customer inquiries regarding consumption and services billed. Completes requests for extensions and payment plans. Provides detailed explanations of billed services, rates and fees, payment plans and extensions, debt collection and legal proceedings.
2 S	Performs financial duties by processing payment transactions, performing calculations, entering data into computer billing systems, reconciling and balancing cash drawers, verifying payments, and preparing reports.
3 S	Performs essential duties including submitting electronic work orders, preparing and mailing written correspondence, tracking data in a variety of formats including Microsoft Excel, filing documents, processing various reports, compiling information and keeping logs.
4 S	Conducts research on customer accounts and analyzes data. Updates account information and processes requests for adjustments. Interprets and follows written policies and procedures. Effectively communicates with other City departments and partner agencies.
5 S	Processes requests and payments for permits. Responds to inquiries via telephone, fax, mail and email.

**CLASS REQUIREMENTS:**

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Formal Education / Knowledge	Work requires knowledge necessary to understand basic operational or technical office processes. Level of knowledge equivalent to four years of high school or equivalency
Experience	One year of inbound call center customer service experience.
Certifications and Other Requirements	N/A
Reading	Work requires the ability to read reports, instructions, and correspondence.
Math	Work requires the ability to perform general math calculations such as addition, subtraction, multiplication and division.
Writing	Work requires the ability to write reports, letters, and general correspondence.
Managerial	N/A
Budget Responsibility	N/A
Supervisory / Organizational Control	Job has no responsibility for the direction and supervision of others.
Complexity	Normal tasks require use of definite procedures, with little deviation. Work involves choices of action within limits set by standard practices and procedures. Professional judgment is required to apply the proper course of action.
Interpersonal / Human Relations Skills	Contacts others within the organization. These contacts may involve similar work units or departments within the City which may be involved in decision making. Works with individuals outside the City who may belong to professional or peer organizations.

**OVERALL PHYSICAL STRENGTH DEMANDS:**

<b>Sedentary X</b>	<b>Light</b>	<b>Medium</b>	<b>Heavy</b>	<b>Very Heavy</b>
S = Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time	L = Light Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	M = Medium Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	H = Heavy Exerting 50-100 lbs. occasionally, 25-50 lbs. frequently, or up to 10-20 lbs. constantly.	VH = Very Heavy 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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*This is a description of the way the job is currently performed. It does not address the potential for accommodation.*

<b>PHYSICAL DEMANDS</b>	<b>FREQUENCY CODE</b>	<b>DESCRIPTION</b>
Standing	O	Staffing a customer service counter
Sitting	F	Computer, desk work, telephone.
Walking	O	Around the office and building
Lifting	O	Supplies and equipment
Carrying	O	Supplies and equipment
Pushing/Pulling	O	Setting up equipment
Reaching	O	For reports, supplies, money
Handling	O	Computer equipment, telephones, ledgers
Fine Dexterity	O	Computer, telephone keypad, tools
Kneeling	O	Filing, obtaining supplies
Crouching	O	Filing, obtaining supplies
Crawling	N	
Bending	F	Filing, obtaining supplies
Twisting	F	Filing, obtaining supplies
Climbing	R	Ladder and stairs
Balancing	R	Stools and risers
Vision	C	Computer monitor, reading, writing and filing
Hearing	C	Communicating with personnel, staff, supervisor and citizens.
Talking	C	Communicating with personnel, supervisor, citizens, telephone
Foot Controls	N	Operating equipment, operating sweeper, driving
Other (specify		

**MACHINES, TOOLS, EQUIPMENT, AND WORK AIDS:**

Desktop computer, telephones and headsets, fax machines, copiers, printers, calculators, Microsoft Windows Office Suite Software, and Northstar or current customer service account software.

**ENVIRONMENTAL FACTORS:**

D = Daily	W = Several Times Per Week	M = Several Times Per Month	S = Seasonally	N = Never
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HEALTH AND SAFETY		ENVIRONMENTAL FACTORS	
Mechanical Hazards	N	Dirt and Dust	N
Chemical Hazards	N	Extreme Temperatures	N
Electrical Hazards	N	Noise and Vibration	N
Fire Hazards	N	Fumes and Odors	N
Explosives	N	Wetness/Humidity	N
Communicable Diseases	N	Darkness or Poor Lighting	N
Physical Danger or Abuse	N		
Other (see 1 below)	N		

PRIMARY WORK LOCATION	
Office Environment	X
Warehouse	--
Shop	--
Vehicle	--
Outdoors	--
Other (see 2 below)	--

- (1)
- (2)

**PROTECTIVE EQUIPMENT REQUIRED:**

None

**NON-PHYSICAL DEMANDS:**

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NON-PHYSICAL DEMANDS	
Time Pressures	C
Emergency Situations	R
Frequent Change of Tasks	O
Irregular Work Schedule/Overtime	R
Performing Multiple Tasks Simultaneously	C
Working Closely with Others as Part of a Team	C
Tedious or Exacting Work	F
Noisy/Distracting Environment	R
Other - Customer Interactions	C