

Customer Accounts Specialist

FLSA Status: Covered
Bargaining Unit: District Council of Trade Unions (DCTU)

General Summary

Positions in this broad class provide specialized customer service and problem resolution to citizens and other customers, including answering customer inquiries and complaints by phone, mail and in-person regarding potentially sensitive actions such as service termination, liens, assessments, payments and account adjustments.

Customer Accounts Specialist I - 30000017

Distinguishing Characteristics

The journey level of this class typically focuses on customer service and problem resolution, including adjustments to customer accounts. It differs from the Office Support Specialist II class because that class provides a wide range of generalist functions. It differs from the Accounting Technician because that class focuses on processing and analyzing accounting transactions; while it may include ancillary customer contact or service, it is not the primary purpose of the Accounting Technician class.

Typical Duties/Examples of Work

1. Answers customer inquiries and complaints by telephone, mail and in-person, regarding policies and procedures related to bills, rates, charges, deposits, accounts; contacts customers to resolve a variety of issues; facilitates problem resolution through others; may advocate on behalf of the customer.
2. Accesses on-line information in accordance with system controls to enter, modify, correct and generate information, invoices, and reports related to customer service and/or billing.
3. Provides explanations and information to customers regarding a wide variety of program services and procedures; provides interpretation of procedures, codes, laws, ordinances and regulations according to established parameters; utilizes effective customer service skills.
4. Coordinates customer service activities with other work groups, bureaus and agencies, as appropriate; makes service requests and referrals.
5. Researches, reviews and analyzes information to resolve issues and problems; may request field actions and investigations; may place and record liens;

reviews results, determines, negotiates and recommends actions, settlements and alternatives within established parameters.

6. Processes customer account data and performs calculations related to estimates, pro-ration, bills, collections; codes, and contracts; posts and reconciles data; opens and closes customer accounts; monitors a variety of customer account activity.
7. Prepares reports, correspondence, notices, ordinances and other information and documentation related to customer service, account actions and information; processes customer payment information as required to ensure accurate records of payment and agency receipts.
8. May receive and receipt customer payments; maintains security of cash, checks and money orders; may make deposits.
9. Assists with staff cross-training and orientation of staff.
10. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

Knowledge of: effective customer service; credit and collection methods, practices and techniques; billing and billing systems

Ability to: establish and maintain effective interpersonal relationships with a diversity of others; maintain confidentiality; interact positively with customers; interpret regulations, codes and procedures; perform accurate math calculations; use 10-key calculator and numerical keyboard accurately

Skill in: oral and written communication; diffusing and resolving difficult or hostile situations; effective problem-solving; computer applications and accurate data entry; research information; assess information and make appropriate recommendations for action

Special Requirements

None

Classification History:

Adopted: 2-03-99:

Class created as a result of DCTU Classification and Compensation Study 1998-99. This class is composed of the following classes:

Customer Accts Spec I Adopted 11-16-82 Revised 06-19-89
(Former class title, Billing Specialist)

June 2009 - Change Job Class number from 0131 to 30000017, due to system change.

Customer Accounts Specialist II - 30000018**Distinguishing Characteristics**

The lead level of this class typically provides direction and coordination for Customer Accounts Specialist, and resolves more difficult customer service and account issues. It is distinguished from Customer Accounts Specialist I by its assigned responsibility to handle more difficult customers; and to either manage more complex accounts/complaints requiring more in-depth research or response, or to provide lead direction to staff.

Typical Duties/Examples of Work

1. Assigns and coordinates customer service tasks; monitors and reviews work; directs work flow and schedules; coaches and trains staff in concepts, procedures and effective techniques; provides input to staff performance evaluation.
2. Develops guidelines and procedures for staff training.
3. Monitors work procedures and systems to identify problems, and recommend improvements.
4. Resolves difficult customer service and account issues beyond the scope of Customer Accounts Specialist; serves as liaison with others to resolve problem issues and escalated concerns; has a higher level of authority and more resources for making settlements and adjustments.
5. Performs accounts maintenance with large complex accounts such as commercial, industrial and multi-family accounts by identifying problems or trends, negotiating problem settlements within defined limits, and serving as a single point of contact for the billing questions.
6. May serve in the absence of the supervisor as appropriate.
7. Performs related duties as assigned.

Required Knowledge, Skills and Abilities

Knowledge of: rules, regulations, codes, ordinances and procedures specific to assignment; effective principles and practices of leadership

Ability to: schedule and assign the work of others

Skill in: demonstrating techniques to others; providing training to others; providing lead direction to staff; including assigning and reviewing work

Special Requirements

None

Classification History:

Adopted: 2-03-99:

Class created as a result of DCTU Classification and Compensation Study 1998-99. This class is composed of the following classes:

132 Customer Accounts Spec Adopted 06-19-89

Revised: 5-04-04: Expanded scope of class to include enhanced customer service assignments.

June 2009 - Change Job Class number from 0132 to 30000018, due to system change.

Working Conditions

Work in this class is typically performed in an office environment. Incumbent is typically required to deal with difficult, distraught or hostile individuals on City property with support available.