



Classification Unit:	Field and Office
Last Revision:	2017

CUSTOMER ACCOUNT SPECIALIST I/II/III

These specifications are intended to present a descriptive list of the range of duties performed by employees in this position. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

Under supervision, positions in the Customer Account Specialist classification perform a variety of functions in receiving and processing service requests; perform fiscal recordkeeping work in maintaining and updating billing accounts; and receive questions and resolve complaints concerning the water delivery services and status of accounts.

DISTINGUISHING CHARACTERISTICS:

Customer Account Specialist I:

Under the specific supervision of the Supervising Accountant, performs customer service duties related to all water services within the District, performs related work as assigned and provides office support duties. Performs a variety of functions in receiving and processing service requests; performs fiscal recordkeeping work in maintaining and updating billing accounts; and receives questions and resolves complaints concerning the delivery of services and status of accounts. Individuals in this class receive training and under close supervision, perform most duties involved in water marketing functions. This is an entry level classification in this series.

Customer Account Specialist II:

Under the general supervision of the Supervising Accountant, performs duties related to water allocations, ordering, delivery and recordkeeping activities, including water user accounts and relations, perform work related to acreage limitations, land registration and all other requirements of the Reclamation Reform Act. Performs a variety of functions in receiving and processing service requests; perform fiscal recordkeeping work in maintaining and updating billing accounts; and receive and resolve complaints and questions concerning the delivery of services and status of accounts. This is a semi-skilled level classification in this series.

Customer Account Specialist III:

Under the general supervision of the Supervising Accountant, and in accordance with the Reclamation Reform Act and all amendments thereto, performs work related to acreage limitations, land registration and all other requirements of the Act, performs duties related to water allocation, ordering, delivery and recordkeeping activities, including water user accounts and relations. This is a skilled level classification in this series.

ESSENTIAL FUNCTIONS

Customer Account Specialist I/II:

- Advises owners and operators of all District facilities, located within the District of the registration procedures, reports and legal requirements and penalties related to the use of the facilities.
- Assists the public in person and on the telephone in completing and filing groundwater production statements and explains rates, calculations, policies, and laws.
- Coordinates with Water Resources Technician and accounting department all changes in status of water producing facilities and maintains neat and accurate records relating to same.
- Uses an on-line computer terminal or a personal computer to enter, edit, and retrieve data and to generate reports.
- Receives and processes service requests, collecting appropriate funds, and coordinates establishment of services with other District staff.
- Receives, processes and approves water orders with applications to determine eligibility, and assembles data for use in preparation of monthly water bills.
- Receives and responds to complaints about District services; resolves a variety of problems related to accurate meter readings, high consumption, delinquent accounts, turn-ons, turn-offs, non-reads, and improper billings.
- Receives and processes billing payments.
- Assists in monthly billing of accounts on billing system.
- Contacts customers by phone and in writing regarding delinquent accounts.
- Coordinates account status problems with District accounting staff.
- Coordinates problems of meter location, type of installation, and meter size with operations and engineering personnel.
- Determines and calculates costs for different types of installations.
- Researches and applies District policies and regulations regarding establishment and maintenance of services.
- Resolves difficulties concerning the processing of orders and delinquent accounts.
- Discusses delivery problems with appropriate management and operations staff.
- Maintains and updates meter reading and route books.
- Establish and maintain cooperative working relationships with co-workers, outside agencies, and the public.
- Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
- Composes, prepares, and types correspondence, reports, and other documents.
- Audits meter readings.
- Communicates with customers (face-to-face, via telephone or email), to discuss and resolve problems and concerns.
- Performs related duties as assigned.

Customer Account Specialist III:

In addition to the essential functions for the Customer Account Specialist I/II:

- Advises landowners and water users of the requirements of the Reclamation Reform Act with regard to acreage limitations and land certifications.
- Process and maintain current water user and landowner land registrations, acreage limitation reports and summaries.
- Advises water users of policies, rules, procedures, and legal requirements relating to the delivery of water.
- Responds to and resolves water users' complaints or inquiries, including more difficult and complex issues.
- Prepares various reports and records pertaining to water deliveries, including monthly bills.
- Communicates information to, and receives information from, District personnel, water users, landowners, and various outside agencies

- Provides oversight and training for subordinate Customer Account Specialists.
- Performs various office support duties and other related duties as assigned.
- Acts as lead liaison to the United States Bureau of Reclamation regarding all land contracting issues including USBR audits.

JOB STANDARDS/SPECIFICATIONS

Customer Account Specialist I/II/III:

Knowledge of:

- Water delivery and distribution systems.
- Principles and methods used in reading, testing, and calibrating meters.
- Customer service procedures and methods of resolving complaints.
- District policies and regulations regarding the establishment and maintenance of services.
- Geography of the District and the location of District facilities.
- District billing practices and fiscal recordkeeping methods.
- Computerized billing and service information systems.
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Ability to:

- Perform a variety of difficult and sensitive customer service functions regarding the establishment and maintenance of District services.
- Maintain and update payment and billing records, resolving problems regarding delinquent accounts.
- Research and evaluate information regarding customer service and payment problems.
- Analyze and evaluate customer complaints.
- Make arithmetic calculations quickly and accurately.
- Coordinate customer service functions with other District functions and services.
- Skillfully use computerized billing and customer information systems and software.
- Maintain tactful and good relations when working with the public regarding District services and complaints.
- Compose, customer letters using standard business letter writing formats and correct English usage.
- Maintain confidentiality of customer records.

TYPICAL PHYSICAL ACTIVITIES

Customer Account Specialist I/II/III:

- Drives a vehicle.
- Work at a desk for an extended period of time.
- Work in an office environment, lift and move objects up to 15 pounds such as large binders, books, and small office equipment.
- Sufficient finger/hand coordination and dexterity to operate and adjust office equipment.
- Regularly uses a telephone for communication.
- Use office equipment such as computers, copiers, and FAX machines.
- Sits for extended time periods.
- Hearing and vision within normal ranges with or without correction.

ENVIRONMENTAL FACTORS

Customer Account Specialist I/II/III:

- Exposure to the sun: 10% or less work time spent outside a building and exposed to the sun.
- Irregular or extended work hours: Occasionally required to change working hours or work overtime.

DESIRABLE QUALIFICATIONS

Customer Account Specialist I:

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

- Two years of increasingly responsible work experience in performing customer service and relations work, preferably including experience in working with a water or wastewater treatment agency.

Customer Account Specialist II:

In addition to the Desirable Qualifications for the Customer Account Specialist I:

- Two years of experience as a Customer Account Specialist with the District. Three years of increasingly responsible work experience in performing customer service and relations work, preferably including experience in working with a water or wastewater treatment agency.

Customer Account Specialist III:

In addition to the Desirable Qualifications for the Customer Account Specialist I & II:

- Five years of experience in general office or recordkeeping work. Prior experience in dealing with the public in service related work is highly desirable.
- Two years of experience as a Customer Account Specialist II with the District.

LICENSE CERTIFICATE REGISTRTION REQUIREMENT

Customer Account Specialist I/II/III:

- Possession of a valid California Class C Driver License may be required at the time of appointment and a driving record acceptable to the District's automobile insurance provider. Failure to obtain or maintain such required license(s) may be cause for disciplinary action. Individuals who do not meet this requirement due to a physical disability will be considered for accommodation on a case-by-case basis.
- Obtain and maintain defensive drivers training certification (training provided by the District).
- Obtain and maintain CPR and First Aid training certification (training provided by the District).

Approved: 2017

s/s Jeff Cattaneo
District Manager