CITY OF OCEANSIDE

REVISED: OCTOBER 2012
JOB CODE: ACCT03, ACCT07
UNIT: OCEA

CUSTOMER ACCOUNT REPRESENTATIVE I
CUSTOMER ACCOUNT REPRESENTATIVE II

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under general supervision, to perform a variety of customer service functions in the processing of financial transactions and collection of monies relating to parking, business licensing, utility or ambulance billing or cashiering; to respond to and resolve customer complaints; and to perform a variety of clerical functions related to the assigned area of responsibility.

CLASS CHARACTERISTICS

Customer Account Representative I - This is the entry-level class in the Customer Account Representative series. This class is distinguished from the Customer Account Representative II by the performance of the more routine tasks and duties assigned to positions within the series, including maintaining records and receipts. Since this class is typically used as a training class, employees may have only limited or no directly related work experience.

Customer Account Representative II - This is the full journey-level class within the Customer Account Representative series. Employees within this class are distinguished from the Customer Account Representative I by the performance of the full range of duties as assigned, including the ability to solve more complex problems and function effectively with little supervision. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the I level, or when filled from the outside, have prior experience. Advancement is not based on time in grade but solely at the discretion of the Department Director, based on the organizational needs of the department and satisfactory completion of all minimum qualifications.

EXAMPLES OF DUTIES - *Examples of duties performed by employees in this class may not include all required duties, nor are all listed tasks necessarily performed by everyone in this class.*

Responds to routine inquiries from the public over the telephone or at a public counter; provides general information and assistance to the public regarding billing, collections and licensing policies and procedures; prepares water and sewer utility invoices and reports; posts utility receipts; researches billing or licensing complaints; collects monies and operates cash register; posts information to computerized records; creates new accounts; balances cash drawer and prepares bank deposits; makes deposits and bags coins; verifies presence and accuracy of payment, credits, receipts and other documents; creates and mails medical bills; processes applications for municipal service, parking permits, business licenses or citations; types bills, forms and associated correspondence; maintains a variety of files and records; ensures information is

current and accurate; researches and retrieves files as necessary; reviews a variety of paramedic reports for completeness; enters reports into computerized billing system; processes requests for subpoenas and confidential medical records; may function as lead worker or assist in training new employees; and performs related duties and responsibilities as required.

MINIMUM QUALIFICATIONS

CUSTOMER ACCOUNT REPRESENTATIVE I

Knowledge of:
- Customer service techniques;
- Basic accounting principles and practices;
- Recordkeeping methods and techniques;
- Modern office procedures and methods;
- Basic principles of mathematics; and
- Pertinent Federal, State and local laws, codes and ordinances.

Ability to:
- Maintain tactfulness and courtesy in high stress situations;
- Learn applicable data processing systems;
- Learn to interpret and explain City policies and procedures;
- Operate a variety of office equipment;
- Respond to inquiries from the public in a tactful manner;
- Understand and follow oral and written instructions;
- Communicate clearly and concisely, both orally and in writing;
- Establish and maintain effective working relationships with those contacted in the course of work;
- Maintain mental capacity which allows for effective interaction and communication with others; and
- Maintain effective audio/visual discrimination and perception to the degree necessary for the successful performance of assigned duties.

Experience and Training Guidelines

Experience: Some experience performing customer service and/or accounting transactions is desirable.

Training: Equivalent to the completion of the twelfth grade.

CUSTOMER ACCOUNT REPRESENTATIVE II

In addition to the qualifications for Customer Account Representative I:

Knowledge of:
- Applicable data processing systems;
- Process of residential, governmental and/or commercial billing and licensing;
- Policies and procedures of collections; and
- Principles and procedures of financial recordkeeping and reporting.

Ability to:

- Interpret and explain City policies and procedures; and
- Perform essential job functions with minimal supervision.

Experience and Training Guidelines

Experience: A minimum of one year experience, subsequent to a successful probationary period, of successful full-time experience performing related customer service work for the City of Oceanside, or equivalent experience when filled from the outside.

Training: Equivalent to the completion of the twelfth grade.

WORKING CONDITIONS

Environmental Conditions: Office environment; exposure to computer screens.

Physical Conditions: Essential and marginal functions may require maintaining physical condition necessary for sitting for prolonged periods of time.