# CUSTOMER ACCOUNTS SPECIALIST II

# **MAJOR FUNCTION**

This is specialized customer service and operational work involving the establishment, maintenance, and resolution of utility service accounts as well as transit related matters. The position requires extensive public contact and the ability to handle complex, technical, or escalated issues with professionalism and accuracy. Employees in this role are responsible for interpreting policies, processing service requests, and ensuring the accuracy of account records in accordance with established procedures. An incumbent is a subject matter expert in an assigned area and is responsible for work in contact centers, in-person contact resolution, online customer support, customer programs, commercial utility services, new connections, QA/QC, loan processing, and credit and collection activities. Work is performed with a high degree of independence under the general direction of a supervisor and is reviewed through audits, internal controls, and overall effectiveness in resolving customer issues and maintaining service standards.

# **ESSENTIAL AND OTHER IMPORTANT JOB DUTIES**

## Essential Duties

Serves in various front and back-office roles within the Customer Operations Department to support utility and transportation-related services. Assists the public seeking to establish or update residential or commercial utility services, including electric, water, natural gas, sewer, solid waste, stormwater, and fire service fees. Aids customers requiring complex account review or escalated issue resolution. Receives and processes power outage reports, providing timely information to customers and coordinating with internal systems to support efficient restoration efforts. Reviews billing histories, sets up and updates utility accounts, and ensures that all customer interactions are handled in accordance with departmental policies.

Staffs customer service desks at key locations, including the utility walk-in service center and various transportation hubs. At the utility walk-in service center, assists customers with starting new utility services, answering billing and loan-related inquiries, and resolving account issues. At transportation walk-in centers, provides route information, issues transit passes, and assists with trip planning for fixed-route and paratransit services.

Establishes deposit requirements on new commercial accounts and creates appropriate billing structures for large multi-unit properties. Coordinates the processing of utility meter releases and oversees the creation of new service addresses. Handles specialized financial adjustments, balance transfers, and collection-related activities including bankruptcies and referring debts to a collection agency. Assists with the processing of rebates, customer loans, and account refunds in compliance with internal controls and City policies.

Monitors service quality by reviewing customer interactions, evaluating financial transactions for accuracy, and recommending corrective actions. Identifies internal process deficiencies and works with superiors to implement improvements. Demonstrates exceptional communication skills and patience in resolving issues in person, by phone, and online, while maintaining a high level of professionalism and public trust. Performs related duties as required.

## **DESIRABLE QUALIFICATIONS**

## Knowledge, Abilities and Skills

Considerable knowledge of utility billing, recording, history, monitoring, and accounting procedures. Considerable knowledge of existing collection methods and procedures. Considerable knowledge of the interface of the Cashier's Office with data processing, consumer services, and accounting records. Ability to work under pressure and maintain a high level of accuracy. Ability to follow complex orders

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and/or written instructions. Ability to establish and maintain a good working relationship with peers, supervisors, and the general public. Ability to maintain and analyze records, to prepare complex records and reports. Ability to exercise good independent judgment in making decisions. Ability to communicate effectively and concisely, orally and in writing. Skill in the use of personal computers and associated programs and applications necessary for successful job performance.

#### Minimum Training and Experience

Possession of a high school diploma or an equivalent recognized certificate and four years of staff, administrative, or professional experience that includes credit and collections, utility billing, utility accounts systems, or customer service; or possession of a bachelor's degree in accounting, finance, or a related field.

#### Necessary Special Requirement

Individuals in this classification are considered essential during emergencies and storm events. They must be available to work extended shifts (12 hours or longer) for prolonged periods and may need to remain away from their families during the duration of the emergency event.

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