

## CUSTOMER CARE OFFICE SPECIALIST II

### JOB DESCRIPTION

**Classification Responsibilities:** A Customer Care Office Specialist II is responsible for providing advanced-level support in dealing directly with the public, in person, in order to process service requests, and receive, tabulate, and balance various payments and/or fines. This class deals primarily with utility account customers (electric, gas, water, wastewater, solid waste, irrigation, and hydrant meters); however, there are times when they deal with customers regarding other City services. Duties include handling escalated customer situations; serving as a temporary lead in the absence of a supervisor; training other staff; completing reconciliation reports; receiving and applying various payments for utility accounts and other City departments; balancing cash drawers and depositing revenue into appropriate general ledger funds; determining what services are available; checking lease agreements and identifications for accuracy to avoid possible fraud; investigating delinquent accounts for collection of bad debts and making payment arrangements or referring to Credit Services; providing information on pricing of utility rates and fees; educating the customer on conservation tips; and processing changes to accounts such as address and due date changes. This classification is expected to serve as the subject matter experts in the Business Office, to handle day-to-day decisions with a greater degree of independence by carrying out assignments without detailed instruction or guidance and is expected to handle the more complex situations.

Employees may progress to this classification by non-competitive promotion after successful completion of at least one year as a Customer Care Office Specialist I, meet the specific criteria-based promotion requirements, and meet the minimum qualifications of the Customer Care Office Specialist II classification.

**Distinguishing Features:** This class is distinguished from the Customer Care Office Specialist I by the greater degree of independence in handling day-to-day decisions, and in the lower amount of direct supervision received, as well as in demonstrated competencies in higher-level functions. This position may also exercise lead supervision over other Customer Care Office Specialist I's in the absence of the supervisor (including training, work scheduling, leaves of absence recommendations, and input to performance appraisal forms). This class has significant daily public contact duties distinguished primarily by the nature (sometimes tense and/or unpleasant) of circumstances associated with the contact. The duties of a Customer Care Office Specialist II are more difficult because of the multiple utilities for which the incumbent must possess knowledge (electric, gas, water, wastewater, solid waste, irrigation, and hydrant meters), utility rate and fee structures, various programs supported and restricted by other funding sources, and/or tax and licensing laws and requirements. This class is supervised by a Customer Service Supervisor, through meetings, reports, and conferences regarding quantity, quality, and efficiency of work performed. This class is FLSA nonexempt.

### QUALIFICATIONS

**Employee Values:** All employees of the City of Mesa are expected to uphold and exhibit the City's shared employee values of Knowledge, Respect, and Integrity.

**Minimum Qualifications Required.** Any combination of training, education, or experience equivalent to graduation from high school or GED. Five years of full-time employment as a cashier and/or teller

involving extensive public contact, bookkeeping, and/or accounting experience. Ability to operate a personal computer (PC) and use word processing software.

**Special Requirements.** None.

**Substance Abuse Testing.** None.

**Preferred/Desirable Qualification.** Public contact and/or public utility experience is highly desirable.

## **ESSENTIAL FUNCTIONS**

**Communication:** Interprets and explains City policies and procedures concerning all utility customer services. Prepares written documents and statistical reports using proper sentence construction, punctuation, and grammar in order to effectively express ideas to others; and resolve disputes or track work unit productivity. Modifies standardized letters to accommodate specific and extenuating circumstances of customer's situation. Exercises excellent customer service and communication skills to be able to handle multiple walk-in customers. Interacts with customers who may be angry, confused, and/or hostile in a tactful, confidential, knowledgeable, and courteous manner. Inquires into sensitive personal and financial information to set up utility accounts and determine payment arrangements. Communicates with other City departments, both orally and in writing. Answers questions from employees regarding the computerized Customer Information System (CIS).

**Manual/Physical:** Operates a variety of standard office equipment including a PC, on-line cashiering system, ten-key calculator, credit card machine, printer, and electronic coin sorter/bill counter. Uses a PC to construct detailed spreadsheets; creates reports; inputs and reviews credit and billing information; completes on-line transactions; and produces memos, letters, and other correspondence. Enters narrative and statistical information into a Customer Information System to update the utility account records and generate various documents and/or reports. Prepares various forms, tabulates activities for statistical purposes, and files reports and forms for utility and other records. Processes a variety of utility bills and requests regarding high bill complaints, account balances, payments received, updated customer information, payments on accounts previously written off, field service orders, hydrant accounts, furlough rates, turn-on and turn-off of utility services, bank corrections, bus passes, returned checks, billing adjustments, bankruptcies, letters of credit, refund checks, and many others. Meets scheduling, attendance, accuracy, and reliability requirements. Reviews the work products of others to ensure compliance with standard operating procedures.

**Mental:** Assigns work to subordinate staff by determining work priorities and considering work flow patterns and current workload of staff. Evaluates the performance of subordinate employees by monitoring overall work flow; spot-checking work completed for volume, accuracy, and timeliness; and reviewing problems or complaints referred by the employee. Resolves problems and complaints referred by subordinate staff. Comprehends written requests and complaints from customers in order to resolve disputes and make corrections to appropriate accounts. Researches customer complaints for discrepancies and resolution. Determines whether a deposit is required and calculates the deposit amount based on an evaluation of a customer's credit history and type of account. Evaluates wastewater fee adjustment forms and recalculates wastewater fees. Comprehends all the Customer Information System computer screens and their function in order to gather information and process a turn-on of residential or commercial customer accounts (gas, electric, water, solid waste, and/or irrigation) in the most efficient and effective manner. Reconciles all monetary receipts received from City services on a

daily basis. Attends to details to assure that forms and/or other information are completed accurately and completely. Makes mathematical computations rapidly and accurately. Learns job-related materials through on-the-job training regarding job procedures, computer transactions, and Revenue Collections Operations policies and procedures.

**Knowledge and Abilities:**

Knowledge of:

utility customer service functions, methods, principles, techniques, and procedures used in the modern office;  
methods, practices, and equipment including proper format for letters, memos, and other written correspondence;  
water and gas service plumbing;  
computerized work order systems used by Customer Service, Water Resources, Energy Resources and Environmental Management and Sustainability;  
basic mathematic principles;  
City of Mesa rate schedules, which includes electric, gas, water, wastewater, solid waste, and irrigation;  
the practices, methods, safeguards, and records involved in revenue processing;  
procedures used for tracing misapplied payments;  
terms and conditions for the sale of City of Mesa utilities;  
policies and procedures for residential and commercial billing processes; and  
the principles, practices, and procedures of employee supervision, training and development, and evaluation.

Ability to:

communicate ideas and information clearly and concisely, both verbally and in writing;  
use the City of Mesa computerized utility billing system;  
read and comprehend utility-related records;  
use a computerized work order system;  
interact with coworkers, management staff, and other City employees to establish and maintain effective working relationships;  
maintain confidentiality of records;  
operate a variety of standard office equipment;  
determine and calculate deposits for utility services;  
research and analyze accounts to be able to explain their status to customers;  
handle multiple walk-in customers;  
maintain a high level of attention to detail for quality control purposes;  
respond appropriately working under production deadlines with multiple interruptions;  
make mathematical computations quickly and accurately;  
maintain concentration on detailed information, over an extended period of time, with accuracy and speed;  
interpret and apply a variety of codes, ordinances, and policies/procedures in the course of work and review of assigned personnel;  
maintain a professional and courteous demeanor, utilizing excellent customer service and communication skills;  
identify causes of delays in the processing of applications and effect their correction and handling;

Customer Care Office Specialist II

Page 4

resolve difficult public contact situations;  
schedule office training seminars/workshops to meet the needs of employees;  
design and order printing materials and maintain an inventory of office supplies and equipment;  
maintain complex filing system and establish retention dates for files;  
research and compile data and prepare statistical reports and schedules;  
objectively evaluate procedures and personnel and implement appropriate corrective actions; participate in the evaluation of new equipment and systems; and  
process invoices for payment, leave requests, and time sheets in supervisors' absence.

The duties listed above are intended only as general illustrations of the various types of work that may be performed. Specific statements of duties not included does not exclude them from the position if the work is similar, related, or a logical assignment to the position. Job descriptions are subject to change by the City as the needs of the City and requirements of the job change.

Revised 1/21

TC/kg/ya

CS4243.DOCX (Full-Time)

PAY GRADE: 43

CS4244 (Part-Time)

PAY GRADE: 43

EEO-AS

IND-8810

JOB FCTN-OFF

SWORN-No

INCREMENTS 62-200