



## Fair Oaks Water FOWD Job Description

### Financial Analyst Customer Service

DEPARTMENT: Customer Service  
FLSA STATUS: Non-Exempt  
DIRECTLY REPORTS TO: Operations Manager  
DIRECTLY SUPERVISES: N/A  
JOB DESCRIPTION DATE: June 24, 2021  
ANNUAL SALARY RANGE: \$51,168 - \$69,076  
JOB CLASSIFICATION: Regular Full-Time

#### **General Statement of Job**

Under direct supervision of the Operations Manager, organizes and reviews the work of Customer Service Representatives performing billing, accounts receivable and collection process for all water accounts. Regularly resolve and respond accordingly to more difficult and complex customer service complaints requiring advanced knowledge of policies and procedures relative to customer service. Perform a variety of complex clerical and account maintenance duties. Performs and leads clerical work involved in maintaining accurate records, answers and/or re-directs customer service requests; receives and accounts for money; assists with various billing functions. Leads, trains and assists Customer Service Representatives in the performance of their duties. Offers administrative support to Operations Manager or others as needed and performs any other related duties that may be required.

#### **Essential Functions**

*The statements contained herein reflect general details as necessary to describe the principal functions of this job, the level of knowledge, the skills typically required and the scope of responsibility. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.*

1. Under direct supervision of the Operations Manager, organizes and reviews the work of Customer Service Representatives performing billing, accounts receivable and collection process for all water accounts.
2. Provides direction to Customer Service Representatives to ensure customer service calls and in-person requests are answered in a timely, efficient and knowledgeable manner.
3. Ensure timely processing of all payments received.
4. Reconciles billing records to ensure all customer accounts are billed.
5. Analyzes reports to ensure new billing services are added to the billing system.
6. Reviews meter readings prior to billing and forwards to the Operations Manager for posting.
7. Bills customer accounts and prepares invoices for each billing cycle. Follow billing procedure to ensure accuracy.
8. Prepares, transmits and releases accurate billing files. Ensures timely mailing of invoices.
9. Administers collection process including posting and mailing of late notices, disconnect letters, final notices, water service disconnects and lien property in accordance with District policies.
10. Coordinates, updates, and maintains customer EFT payment accounts and processes.
11. Administers the processing of duplicate bills, prorated bills, returned mail and returned checks within a 24-hour period.
12. Investigates disputed bills and payments; makes necessary account adjustments.
13. Handles accounts payable and related reporting when requested.

14. Assists in training employees in specific work procedures and works with employees to correct deficiencies.
15. Interprets and researches policies and procedures. Exercise judgment in responding to the more complex and difficult customer inquiries and complaints pertinent to billing, fees, rate structures and water services.
16. Provides direction to Customer Service Representatives to ensure customer service calls and in-person requests are answered in a timely, efficient and knowledgeable manner.
17. Prepares a variety of reports as needed.
18. Reviews County Records daily for ownership change information. Initiate ownership change process for new owners. Processes returned checks within 24 hours of initial notification. Makes copies of returned checks. Makes copies of bills prior to mailing and stamps with completion date.
19. Responds to public inquiries in a courteous and friendly manner; able to apply and communicate policies and regulations regarding water service, billing and meters to customers; provides information within scope of knowledge or refers to the proper person and/or office; Greets and accommodates visitors and customers at the counter, responds to their inquiries, as necessary.
20. Logs all customer requests for change of address, new homeowner, billing cycle changes and billing adjustments. Makes necessary adjustments to customer accounts within 24 hours of adjustment request.

### **Other Duties**

1. May assist with the duties of the Financial Analyst when directed by District management.
2. Checks and responds to customer service email and voice mail daily.
3. May coordinate agendas and participate in conducting customer service meetings.
4. Assists with and coordinates billing cycles.
5. Assists with and coordinates billing software and hardware computer issues with vendor.
6. Ensures adequate billing postage and supplies are always available to District staff.
7. Maintains and ensures coverage, as needed, in customer service.

### **Job Standards/Specifications**

#### **Knowledge of:**

- Finance, business and accounting principles.
- Advanced principles and practices of customer service procedures and methods of resolving complaints.
- Principles and practices of a technical and functional lead role include the training of staff.
- Current billing practices and fiscal recordkeeping methods.
- Computerized customer service and data management information systems.
- Intermediate research techniques.
- Intermediate to advanced mathematics.

#### **Ability to:**

- Efficiently complete routine accounting tasks – including accounts payable.
- Compile and manipulate complex databases.
- Provide technical and functional leadership and train customer service staff.
- Explain and interpret policies, regulations and procedures.
- Review, analyze, prepare and revise business procedures.
- Analyze data, exercise judgment and draw logical conclusions.
- Research, analyze and evaluate information regarding complex customer service and payment problems for resolution.
- Maintain accurate records and files.

- Maintain and update payment and billing records, resolving problems regarding delinquent accounts.
- Make arithmetic calculations quickly and accurately.
- Coordinate customer service functions with other FOWD functions and services.
- Skillfully use computerized billing and customer information systems and software.
- Maintain tactful and good relations when working with the public regarding FOWD services and complaints.

### **Typical Physical Activities**

- Exert light to moderate physical effort in sedentary to moderate work involving sitting most of the time, but may involve walking or standing for brief periods.
- Use fine and gross motor coordination in preparing reports and walking to meetings, driving and entering data into the computer.
- Travel infrequently by vehicle for FOWD related duties and activities.
- Coordinate eyes, hands and fingers to perform semi-skilled tasks including typing and calculating.
- Hearing and vision within normal ranges with or without correction.

### **Environmental Factors**

- Work primarily in an office environment, some outdoor work may be required.
- Irregular or extended work hours: Occasionally required to change working hours or work overtime.

### **Desired Qualifications**

- Bachelor's degree in finance, business administration or related field.
- Minimum of five (5) years of customer service experience.
- Minimum of two (2) years of experience in a lead customer service role.
- Advance skill in current Microsoft Office Applications.
- Any combination of education, training and experience may qualify if it would provide the skills, knowledge, and abilities to accomplish the job requirements.

### **Required Licenses/Certifications**

- Graduation from high school or equivalent.
- Valid CA Driver's License.

*Fair Oaks Water FOWD is an equal opportunity employer and makes employment decisions based on merit. We want to have the best available person in every job. FOWD policy prohibits unlawful discrimination based on race, color, creed, sex, religion, marital status, age, nation origin or ancestry, physical or mental disability, medical condition including genetic characteristics, sexual orientation, or any other consideration made unlawful by federal, state or local laws. All such discrimination is unlawful. In compliance with the American Disabilities Act, Fair Oaks Water FOWD will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective employees and incumbents to discuss potential accommodations.*

I have received, read and understand the above job description.

Name (Please Print):

---

Signature:

---

Date:

---

Operations Manager: Shawn Huckaby

---

Signature:

---

Date:

---

General Manager: Tom R. Gray

---

Signature:

---

Date:

---