



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: January 1, 2026
ANNUAL SALARY RANGE: \$62,899.20 - \$84,884.80
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 with the Fair Oaks Water District (FOWD). 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 redirects 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 primary 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 FOWD 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 FOWD 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 FOWD 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 District is an equal opportunity employer and makes employment decisions on the basis of merit. We want to have the best available person in every job. District policy prohibits unlawful discrimination based on race, color, creed, sex, religion, marital status, age, nation origin, or ancestry, physical or mental disability, and 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 District 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: _____

Manager: Shawn Huckaby _____

Signature: _____

Date: _____

General Manager: Tom R. Gray _____

Signature: _____

Date: _____