



**AUGUST 2019**  
**FLSA: NON-EXEMPT**

## **OFFICE TECHNICIAN II**

### **DEFINITION**

Under general supervision, performs a wide variety of administrative and office support duties for an assigned department and/or program, requiring full knowledge of its policies, procedures, and operational details; establishes and maintains customer accounts for water services; provides direct customer service associated with utility payments, requests for service, responding to complaints and providing information; provides assistance for a wide variety of assignments related to the administration of departmental projects and programs; and performs related work as required.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the Senior Office Technician/Staff Accountant and the Business Manager. Exercises no supervision of staff.

### **CLASS CHARACTERISTICS**

This is the journey class in the technical office support series. Incumbents at this level perform varied administrative and office support duties, including providing assistance to the public and staff regarding department-related projects and programs. While 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, work is still reviewed regularly by assigned management and/or supervisory staff. This class is distinguished from the Senior Office Technician in that the latter performs the most complex customer service and billing tasks, performs more general paraprofessional accounting duties, and provides technical direction and training to lower-level staff.

### **ESSENTIAL JOB FUNCTIONS**

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Performs a wide variety of routine to complex administrative and clerical duties to support departmental operations, including filing, preparing records and monthly reports and data entry.
- Coordinates monthly billing through production and mailing of customer bills, including downloading water use data from meter readers and processing delinquency and closing notices; completes spreadsheets that compute water sales data analysis.
- Operates computer billing software to export and import electronic data files, meter reads, lock box payment processing and late notices.
- Operates computer billing systems; edits, prepares, and sends bills; maintains and reconciles a variety of customer billing records as directed; estimates proper billing amounts and makes appropriate adjustments ensuring proper billing codes.

- Provides customer service including answering questions, problem solving with customers, and dispatching field service requests, processing customer change information by phone or counter, and making the necessary changes to District, customer or meter records.
- Assists customers with property information in regards to water accounts such as researching information for correspondence, reviewing of atlas maps and official District records, as needed.
- Prepares customer correspondence and reports when requested.
- Resolves basic to progressively more complex problems/issues relative to customer service, water service, and payment for services.
- Assists management and staff in various office management and administrative functions.
- Monitors variance reports and spreadsheets and completes various informational spreadsheets.
- Processes daily water receipts computer download from the bank; reconciles water receipts submitted by bank and received by District computer; reconciles daily receipts and prepares daily bank deposits.
- Answers customer inquiries by phone, in person or by email; responds to complaints and requests for information from the public; directs callers to appropriate District staff; assists and/or directs the public to appropriate locations/staff; represents the District to all callers and visitors in a professional and customer friendly manner.
- Interprets policies and procedures and explains service fees, rates, and procedures to customers.
- Receives and processes service requests and transfer orders, sets up new accounts, and determines and collects necessary charges.
- Makes billing arrangements for new accounts and prepares closing bills for cancelled service, including verification of deeded ownership changes.
- Receives customer payments in person, via online bill pay, or by mail; makes change and issues receipts; balances cash receipts, processes mail payments, develops totals, prepares deposit documents and end-of-day reports, and delivers daily bank deposits.
- Resolves issues and problems regarding the processing of orders and delinquent accounts.
- Verifies and reviews forms and reports for completeness and conformance with established regulations and procedures; applies departmental and program policies and procedures in determining completeness of applications, records, and files.
- Receives, opens, time stamps, sorts, and distributes incoming and interdepartmental mail; prepares and distributes outgoing mail.
- Operates standard office equipment, including job-related computer hardware and software applications, facsimile equipment, and multi-line telephones; may operate other assignment-specific equipment; may perform basic maintenance and troubleshooting on assigned equipment.
- Orders and maintains office supplies and equipment.

- Maintains accurate records of work performed.
- Performs other duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Practices and procedures related to accounting for billing purposes and the maintenance of customer accounts.
- Applicable Federal, State and local laws, codes, regulations, policies, and procedures related to the assigned functions.
- Business arithmetic and basic statistical techniques.
- Business letter writing and the standard format for reports and correspondence.
- Computer applications related to the work, including utility billing software, word processing, database, and spreadsheet applications.
- Record keeping principles and procedures.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service to public and District staff, in person and over the telephone.

### **Ability to:**

- Deal tactfully with the public and others in providing information, answering questions, and providing customer service.
- Respond to and effectively prioritize multiple phone calls and other requests or interruptions.
- Compose correspondence independently or from brief instructions.
- Balance cash receipts and maintain accurate financial records.
- Make accurate arithmetic and basic financial and statistical computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Interpret and implement policies, procedures, and technical processes.
- Maintain detailed and accurate records.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.

- Use English effectively to communicate in person, over the telephone and in writing.
- Use tact, initiative, prudence and independent judgment within general policy, procedural and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

Equivalent to the completion of the twelfth (12<sup>th</sup>) grade and two (2) years of experience in customer service, maintaining financial and billing records, and/or related technical office support.

**Licenses and Certifications:**

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.