



Utility Account Specialist-Billing Lead

Department:	Plymouth Utilities	FLSA Status:	Non-Exempt
Division:	Administrative	Job Status:	Non-Bargaining Unit
Reports to:	Finance Manager	Location:	Plymouth Utilities Operations Center
Prepared by:	Finance Manager	Date:	February 10, 2023

GENERAL DESCRIPTION

Under the direction of the Finance Director, the Utility Account Specialist is a member of a small team assisting Plymouth area residents and businesses with inquiries regarding electric, water, wastewater, stormwater, garbage and recycling services. This position performs a variety of administrative and accounting tasks, handling a variety of complex and varied billing and service issues, while ensuring customer satisfaction and regulatory compliance.

JOB FUNCTIONS

The following duties and responsibilities are not to be construed as exclusive or all-inclusive. Other duties and responsibilities may be assigned and required.

Essential Job Functions of a Utility Account Specialist:

- Assist customers in a professional, efficient, and friendly manner.
- Answer questions, investigate and resolve emerging problems, and respond to customer complaints; work to resolve customer concerns and escalate issues when appropriate.
- Establish and maintain accurate and confidential customer records, processes requests for the start, cancellation and/or change of service. Verify customer credit and deposit information.
- Document customer interactions in Utility Billing account notes. (complaints, resolutions, disconnections, payment plans, payment difficulties, etc.).
- Process a variety of customer payments and assist with daily deposit (night box, mail, PSN batches, ACH, and in-person payments).
- Prepare customer correspondence (budget billing letters, special letters, mailings, average usage inquiries, and billing adjustments).
- Review and explain utility bills to customers. Explain utility service standards and requirements to customers.
- Build and maintain positive working relationships with co-workers, other City/Utility employees, and the public using principles of good customer service.

Essential Job Functions for Billing Lead

- Request and review meter reading information for Utility Billing. Correct VEE issues and monitor exception reporting and proof reports. Manually add solar and other "no reads". Request meter tech to manually read meters when needed.
- Calculate auto billing and review billing register. Make corrections and apply estimates when needed. Calculate penalties. Review billing changes like read-ins and read-outs, Process billing, print reports and send web tables to Info Send. Close Cycle in Utility billing and print reports.
- Review customers to identify termed customers with credit balances, transfer balances as needed, enter billing adjustments, refund overpayments.
- Create Large Power billing in connect and manually add BOD information into billings. Review Large Power auto billing to Excel bills and make any corrections or estimates as needed. Print and mail Large Power bills and send an electronic copy to WPPI.
- Set up new and remove termed customers, meters, services and rates. Ensure all customers are set up to bill and rates will calculate correctly.

- Monitor WPPI for events and alarms daily. Add new banking information for new ACH sign-ups.

OTHER DUTIES

- Provide back up for other office staff.
- Perform all other duties as assigned.

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

- Ability to communicate information, policies and procedures clearly, concisely and tactfully, both verbally and in writing.
- Must possess a high level of integrity and work ethic.
- Ability to actively listen to customers with empathy and patience to help resolve issues.
- Maintain accurate records; verify information; compile and reconcile numerical and financial data.
- Exercise independent judgment in applying appropriate policies and procedures.
- Effectively and simultaneously manage a variety of tasks and assignments; work effectively under the pressure of deadlines.
- Ability to read, analyze and interpret utility business information and regulations, and respond to questions from department heads, co-workers, and the general public.
- Ability to calculate figures and amounts such as discounts, interest, and percentages.
- Proficient in using Microsoft Office Suite (includes Word, Excel, and Outlook).
- Experience using GIS, CIVIC Connect, or other ERP system preferred.

EDUCATION AND TRAINING

- Graduation from an accredited college, university or technical school with an Associate's Degree.
- Two (2) to four (4) years related experience desired.
- In evaluating candidates for this position, the City may consider a combination of education, training and experience which provides the necessary knowledge, skills and abilities to perform the duties of the position.
- Office experience which regularly requires the ability to communicate orally and in writing with a variety of people, as well as frequent interaction with the general public.
- Valid Wisconsin driver's License.

WORKING CONDITIONS

- Environment: Work is performed in a standard office setting; may require irregular work hours and may work from more than one location.
- Physical: Primary function require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to stoop, bend, kneel, crouch, reach, and twist; to lift (up to 50 lbs), carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; to operate automobile; and to verbally communicate to exchange information.
- Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Disclaimer: The job description has been prepared to assist in evaluating various classes of responsibilities, skills, and working conditions. It indicates the kinds of tasks and levels of work difficulty required of the position. It is not intended as a complete list of specific duties and responsibilities. Nor is it intended to limit or modify the right of any supervisor to assign, direct, and control the work of employees under supervision. Nothing contained herein is intended or shall be construed to create or constitute a contract.