

ACCOUNT CLERK

GENERAL SUMMARY

Primary functions of the job are to provide customer assistance and perform financial functions related to customer accounts. Incumbents receive and record payments, keeps accurate records, creates and processes invoices, reconciles amounts collected and/or billed, and provide front desk customer assistance. Employees in this job have no formal supervisory role, however, work as part of a team and are responsible for ensuring that the team meets its objectives.

Employees must meet the minimum requirements, conditions of employment, and be able to perform successfully all essential duties and responsibilities with or without reasonable accommodations.

PRIMARY DUTIES AND RESPONSIBILITIES (may include but are not limited to the following)

- Processes customer billings and payments within established procedures.
- Compiles, prepares, and verifies billing and payment information related to customer accounts.
- Provides basic customer service, including delivery of accurate, prompt, and courteous assistance to internal and external customers, both verbally and in writing.
- Classifies receipts and disbursements within established procedures, referring questionable items to a supervisor.
- Performs a variety of routine research in order to obtain information regarding customer accounts.
- Enters and checks account information and customer data into established spreadsheets, databases, or computer systems.
- Tabulates batch totals and balance transactions.
- May review technical and legal documents (such as blueprints, maps, and deeds) to verify and update customer account information.
- Monitors and maintains appropriate levels of supplies and materials in support of unit operations and activities.
- Sorts and files materials (paper, computer or imaging), retrieves file materials, and keeps a record of file movement.
- May schedule appointments or customer work orders.
- Performs basic mathematical calculations to ensure accuracy regarding customer accounts.
- Performs a variety of routine clerical activities in support of the assigned department.
- Uses a wide variety of office machines such as printers, personal computers, facsimile machine, postage machine, adding machine, scanners and copiers.

TRAINING, AND EXPERIENCE (minimum requirements)

- High School Diploma or G.E.D.
- One to two years related experience
- College level course work in accounting may substitute for up to one year of experience

CERTIFICATIONS, LICENSES (minimum requirements)

None required

CONDITIONS OF EMPLOYMENT (minimum requirements - legal or contractual pre-employment obligations and/or requirements, such as drug testing, background check, etc.)

A background check may be required initially and periodically for an individual hired, transferred, reclassified, promoted, or currently working in this job. Appointment to or continued employment in this job is contingent upon a satisfactory background check which may include, but is not limited to: confirmation of a persons' identity; review of criminal conviction records; verification of educational degree, license, or certificate required for the position; review of Department of Motor Vehicles records; Department of Justice fingerprint scan; and/or drug and alcohol testing as required and allowable by law. A satisfactory background check is defined as the absence of a criminal history record which bears a demonstrable relationship to the applicant's or employee's suitability to perform the required duties and responsibilities of the position.

DISTINGUISHING CHARACTERISTICS

Work involves gathering and analyzing information to determine the best course of action, based on general guidelines or rules of operations. This requires the use of judgment to choose alternatives, many of which may be correct, but one is better than another depending on the situation. Errors at this level could cause serious, but short-term consequences involving significant financial impact or cost, reduced service to the public, and/or strong negative citizen reaction requiring intervention from a higher-level manager and could impact others outside of the department.

Compared to the Account Clerk Specialist classification, this job is less complex and varied and requires less knowledge of accounting principles.

PHYSICAL DEMANDS, WORK ENVIRONMENT, AND OTHER REQUIREMENTS

- Work is performed in an office environment
- May be required to reach with hands and arms; sit; stand; talk and hear; use hands to finger, handle, or feel
- May be required to lift/move up to 50 pounds (such as a box of paper)

KNOWLEDGE, SKILLS, ABILITIES, COMPETENCIES (minimum requirements)

- Basic knowledge of English grammar, spelling, punctuation, and simple mathematical functions such as addition, subtraction, multiplication, division, percentages, ratios, etc.
- Skill in operation of modern office equipment such as personal computer, facsimile, copiers, scanners and telephones
- Basic skill in use of personal computer software, including spreadsheets and word processing
- Interpersonal skills necessary to work courteously and effectively with other employees and the public

- Ability to accurately organize and maintain paper documents and electronic files
- Ability to maintain the confidentiality of information and professional boundaries
- Ability to comprehend, process and apply both verbal and written skills appropriate to the job
- Ability to detect basic errors and make corrections as directed and under established procedures
- Ability to use County resources effectively and efficiently