

*To perform this job successfully, an individual must be able to perform the essential job functions satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the primary job functions herein described. Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out in the job description, but which may be reasonably considered to be incidental in the performing of their duties just as though they were actually written out in this job description.*

### Financial Service Representative II

**Department:** Finance  
**Pay Grade:** 506  
**FLSA Status:** Non-Exempt  
**Job Code:** F375

#### JOB SUMMARY

The purpose of this classification is to perform and provide analytical analysis and customer service duties to support the account management and billing operations for City property taxes and utility billing. Work involves establishing and maintaining account information; performing data analysis of customer accounts and retrieval; assisting citizens with account questions; maintaining related files and records; analysis of account records; contacting customers to collect delinquent accounts; initiating actions for non-payment; and/or receiving and posting payments from mail and on-line payments.

#### ESSENTIAL JOB FUNCTIONS

- Establishes and maintains customer accounts for assigned programs including property taxes and utility services. Reviews applications for utility services, business license applications and homestead exemptions and makes appropriate changes; enters and/or downloads data into automated information systems; assigns account numbers and/or proper license codes; maintains accurate and current information reflecting account numbers, customer names and addresses, tax billing, business accounts and utility billing information, or other pertinent account information.
- Facilitates and monitors the division's customer service activities for property taxes, utility billing and business license monitors customer service requests for taxes, utilities and business accounts. Generates batches and prints a wide variety of operational reports for taxes, utilities and business accounts. Reviews and analyzes reports for unapplied credits, billing adjustments, payment adjustments and accounts receivable reports.
- Reviews, analyzes and computes assessment change notices from Fulton County Assessors Department to determine proper adjustment for refunds. Utilization of proper batch codes

for auditing purposes and tracking changes in the digest. Updates and maintains adjustment spreadsheets for proper accounting and audit purposes.

- Receives, determines and calculates assessed amount to be supplemental billed. Accurately updates the account for billing purposes. Print billing proof list to validate and balance with the totals from the Fulton County Tax Digest List.
- Coordinates printing of the property tax, business license certificates and utility bills with third party vendor. Requests and reviews sample bills for accurate billing and grants approval for printing and mailing.
- Inputs, processes and calculates assessed amount for the appropriate homestead exemption. Inputs new homestead exemptions.
- Receives and reviews adjustments for utility accounts and property tax; enters processes and records adjustments as appropriate; updates spreadsheets for account reconciliation; provides information to accounting staff for the processing of refunds.
- Receives customer requests for new services and makes changes to existing services. Updates meter readings for move out and move in. Receives and processes billing and payment adjustments for utility billing, business license and property taxes.
- Reviews account records to identify utility billing, business license, property tax and/or other types of delinquent accounts; determines appropriate collection methods for delinquent accounts; prepares and mails collection letters and establishes payment schedules.
- Prepares and processes final notifications for delinquent water accounts which informs the customer that service will be cut off; and notifies the Public Works Department to cut off service for delinquent accounts and to re-establish service once accounts are paid in full.
- Receives and researches returned checks; attempts to redeposit checks; copies checks which cannot be deposited; debits customer accounts for returned checks; applies service charge to customer's account; notifies appropriate staff and departments of account debit; and prepares and mails letters to customers regarding returned checks.
- Establishes and maintains department files, records and documentation; documents customer service issues and actions; and prepares correspondence and letters pertaining to customer accounts.
- Researches misapplied payments and makes appropriate adjustments and corrections.
- Receives, processes and posts electronic payments for utility, business and tax accounts.
- Serves as liaison between the Finance Department and banking institutions regarding returned checks; lockbox activities, account inquiries and setting up new merchant services. Administrator for credit cards for both point of sale and web/phone acceptance. Trains departments and assists with any credit card issues.
- Prepares monies for deposit. Receives; date stamps and distributes mail.
- Operates a personal computer, and general office equipment as necessary to complete essential functions, to include the use of word processing, spreadsheet, database, or other system software.
- Maintains and updates City of Roswell Internal accounts and unclaimed properties.
- Receives and enters new meter applications and sewer permits
- Makes all financial adjustments necessary to accounts that have been granted exemptions.
- Prepares and provides information to attorneys for real estate closings.
- Performs other related duties as required.

## **MINIMUM QUALIFICATIONS**

### **Education and Experience:**

Requires a High school diploma or GED; supplemented by three (3) years of clerical, bookkeeping and/or customer service experience; or any equivalent combination of education, training, and experience which provides the requisite knowledge, skills, and abilities for this job.

### **Licenses or Certifications:**

- None

### **Special Requirements:**

- None

### **Knowledge, Skills and Abilities:**

- Knowledge of rules, regulations, policies and procedures governing City property tax, utility billing, and occupational tax programs.
- Knowledge of general bookkeeping practices, customer service principles, and of recordkeeping and filing techniques. Skill in the use of computers and general office equipment.
- Ability to maintain automated databases, spreadsheets, and manual records and files pertaining property tax, utility billing, and occupational tax programs and customer accounts.
- Ability to deal tactfully and courteously with customers and the general public.
- Ability to determine, calculate, tabulate, or summarize data/information. Includes performing subsequent actions in relation to these computational operations.
- Ability to apply principles of persuasion and/or influence over others in coordinating activities of a project, program, or designated area of responsibility.
- Ability to operate, maneuver and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential functions.
- Ability to utilize a wide variety of reference, descriptive, and/or advisory data and information.
- Ability to perform addition, subtraction, multiplication, and division; the ability to calculate decimals and percentages; the ability to utilize principles of fractions; and the ability to interpret graphs.
- Ability to apply principles of rational systems; to interpret instructions furnished in written, oral, diagrammatic, or schedule form; and to exercise independent judgment to adopt or modify methods and standards to meet variations in assigned objectives.
- Ability to exercise judgment, decisiveness and creativity in situations involving evaluation of information against measurable or verifiable criteria.

## **PHYSICAL DEMANDS**

The work is sedentary to light which requires the ability to exert light physical effort, but which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5-10 pounds). Tasks may involve extended periods of time at a keyboard or work station. Tasks also require the ability to perceive and discriminate colors or shades of colors, depth, texture, and visual cues or signals. Some tasks require the ability to communicate orally.

## **WORK ENVIRONMENT**

Work is regularly performed without exposure to adverse environmental conditions.

**The City has the right to revise this job description at any time. This description does not represent in any way a contract of employment.**

*The City of Roswell, Georgia commits to a policy of equal employment opportunity for applicants and employees, complying with local, state and federal laws. The City's policy is to employ qualified persons without discrimination regarding race, creed, color, religion, age, sex, country of national origin, marital status, disability, sexual orientation, gender identity, genetic information, political affiliation, ethnicity, or status in any other group protected by federal/state/local law.*