



**DATE:** May 9, 2019

**TO:** Personnel Commission

**FROM:** Director of Human Resources

**SUBJECT:** Revised Job Description for Senior Customer Account Clerk

### **RECOMMENDATION**

That the Personnel Commission reviews and comments on the revised job description for the position of Senior Customer Account Clerk to ensure that employment standards are job-related. Job-related standards address all aspects of the job description, including supervision exercised, special requirements, education, and experience.

### **SUMMARY**

The Senior Customer Account Clerk job description has been updated to meet the needs of the Revenue Division in the Finance Department. The changes made to the job description reflect alignment with the internal organizational structure of the City's Classification plan and reflect the more complex duties of the Senior Customer Account Clerk. The job description was also updated to reflect current technology and the knowledge, skills and abilities required for the position. Lastly, the license requirement was revised to allow flexibility for candidates that do not possess a California driver's license to demonstrate the ability to travel to various locations in a timely manner as required in the performance of their duties.

### **BACKGROUND AND DISCUSSION**

In addition to adoption and approval of the City's Classification Plan, the Personnel Commission reviews job descriptions to ensure that employment standards are job-related. The City utilizes a standard format when creating and revising job descriptions. Human Resources staff reviews all job descriptions with the respective departments and updates each to align the job description with the City's Classification Plan. In addition, Human Resources staff makes any adjustments to the job requirements as provided by the department prior to initiating a recruitment process.

The Revenue Division in the Finance Department will continue to utilize the Senior Customer Account Clerk position to perform moderately complex duties in the preparation, maintenance, and processing of public service revenue billing and payment functions related to assigned program, business license, utility billing or collection, and excise tax. The Senior Customer Account Clerk job description was created in May 1990. Human Resources staff

reviewed the advanced journey level and journey level job descriptions in the Customer Account Clerk series, to ensure internal alignment within the organizational structure.

The journey level classification was revised in November 2010 and reflected current duties performed. Human Resources staff updated the advanced journey level classification to accurately reflect the current complex duties of the Senior Customer Account Clerk classification. The Senior Customer Account Clerk performs moderately complex clerical accounting duties and resolves escalated issues regarding area of assignment. They also exercise technical and functional supervision over Customer Account Clerks, perform research and analysis, and compile and prepare moderately complex reports and correspondence.

Additional edits made to the Senior Customer Account Clerk job description included: updating language to reflect current technology used in the industry; adding knowledge, skills and abilities required for the position to reflect the progression in the Administrative Clerk series; and revising the license requirement to comply with the American with Disabilities Act of 1990. Driving is not an essential function of the Administrative Clerk series and requiring a driver's license as a minimum qualification could result in qualified individuals with disabilities failing to apply for a job or being screened out for a non-essential function of the job.

Human Resources staff also shared the proposed changes with the Finance Department and with SEIU Local 1021, the bargaining group that represents this classification. Human Resources staff met with representatives of SEIU Local 1021 to explain the need for the proposed changes, and the union representatives did not object to them.

The changes to the Senior Customer Account Clerk job description are as follows:

#### **DEFINITION**

Added: "...and customer service..."

Removed:

- "...customer or..."
- "...functions including water..."

Replaced:

- "..., business tax, parking citations, business license and permit applications; and to work..." with "...and payment functions: performs moderately complex clerical accounting duties and the processing of posting of accounting records and financial transactions such as accounts receivable and or accounts payable; and works..."

#### **DISTINGUISHING CHARACTERISTICS**

Added: "...assigned program;..."

Replaced:

- "... tax..." with "...license..."
- "... water billing..." with "...utility billing or collection..."

- “... cash receipts...” with “...excise tax...”

**Replaced: “SUPERVISION RECEIVED AND EXERCISED” with “SUPERVISION RECEIVED”**

Added: “...or other supervisory staff.”

**Added: “SUPERVISION EXERCISED” Section**

Added: “Exercises technical and functional supervision over Customer Account Clerks and other clerical staff.”

**Replaced: “EXAMPLE OF DUTIES” with “ESSENTIAL DUTIES”**

Added:

- “..., but not limited to...”
- “...and resolves escalated issues...”
- “Performs research and analysis; collects and compiles statistical and financial data for reports.”

Replaced:

- “Perform...” with “Performs...”
- “Respond...” with “Responds...”
- “...special...” with “...event...”
- “Verify...” with “Reconciles records and verifies...”
- “...makes adjustments in accounts...” with “...audits accounts and makes adjustments...”
- “Process, code, enter and verify...” with “Processes, codes, enters and verifies...”
- “Verify...” with “Verifies...”
- “...special...” with “...event...”
- “Notify customers of...” with “Communicates with customers regarding...”
- “Coordinate...” with “Coordinates...”
- “Compose correspondence and other documents related to assignment.” with “Compiles and prepares moderately complex reports and correspondence; prepares technical reports and documentation relating to area of assignment.”
- “Perform...” with “Performs...”

**Replaced: “MINIMUM QUALIFICATIONS” with “JOB RELATED AND ESSENTIAL QUALIFICATIONS”**

**Knowledge of:**

Added:

- “...and software.”
- “Basic statistical methods and mathematics.”
- “Standard English usage, spelling, grammar, and punctuation.”

Replaced:

- “Pertinent municipal, state, and federal codes...” with “Federal, state and municipal codes...”

- “Adapt to the City’s accounting procedures and follow its policies.” with “The City’s accounting procedures and policies.”

**Ability to:**

**Added:**

- “Provide direction and coordination of others.”
- “...; interface effectively with members of the public under adverse circumstances.”
- “Make arithmetical calculations, postings, and comparisons rapidly and accurately.”
- “Collect, compile, and verify accounting data and research customer and general ledger accounts.”
- “Maintain organized, legible, and accurate files and records.”
- “Operate a ten-key calculator.”

**Replaced:**

- “...oral...” with “...orally...”
- “Learn to use computer based information.” with “Use an accounting information system.”

**Replaced: “EXPERIENCE AND TRAINING” with “EXPERIENCE AND EDUCATION”**

Replaced: “...of education and training...” with “...equivalent to experience and education...”

**Added:**

**License and Certificates:**

- “Possess and maintain a valid California Class C Driver’s license OR demonstrate the ability to travel to various locations in a timely manner as required in the performance of duties.”

**Added: “SPECIAL REQUIREMENTS” Section**

“Essential duties require the mental and/or physical ability to: work in a standard office environment and use standard office equipment and current software; grasp, perform repetitive hand movements and fine coordination to prepare documents and data using a computer keyboard and mouse/trackball; sit for prolonged periods of time; stand, walk, reach, bend, and safely lift and move equipment and materials weighing up to 35 pounds; converse by telephone, by email, in person, and be clearly understood; read and comprehend documents; interact with the public and all different levels of City staff in an effective and professional manner. Essential functions must be performed with or without reasonable accommodation.”

**PROBATIONARY PERIOD**

Replaced: “Six months.” with “One (1) year.”

**STRATEGIC INITIATIVES**

This agenda item is a routine operational item and does not relate to one of the Council’s Strategic Initiatives.

**FISCAL IMPACT**

There is no fiscal impact to the budget as a result of the above proposed change to this job description.

*Prepared by:* Lisette Del Pino, Acting Senior Human Resources Analyst

*Recommended by:* Nina S. Collins, Director of Human Resources

Approved By:

A handwritten signature in black ink, appearing to read 'K. McAdoo', written over a horizontal line.

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Kelly McAdoo, City Manager