

ACCOUNT SPECIALIST

DISTINGUISHING FEATURES OF THE CLASS: The incumbent performs financial record keeping or record analysis work. Specific instructions are given when starting work, but as routines and departmental policies and regulations are learned, the employee works only under general supervision. This position is primarily responsible for maintaining customer account and agency inventory records on a computerized system. The duties of this position include interaction with customers, agency staff and independent contractors to facilitate the coordination of equipment repairs, customer requests and complaints while ensuring compliance with agency regulations. Explanation of office policies or applicable regulations to the public is also a duty of this position. Supervision is not typical of this class.

TYPICAL WORK ACTIVITIES: (Illustrative Only)

- Participates in the keeping of accounting records including, customer accounts, corporate accounts and inventories;
- Participates in the preparation of annual reports or monthly financial reports and makes recommendations concerning the establishment of new forms and/or procedures;
- Creates and maintains customer accounts and inventory lists;
- Prepares purchase requests, vouchers for payment, etc.;
- Issues receipts for monies received;
- Compiles data for and helps in the preparation of simple financial and statistical reports;
- Sorts, indexes and files requisitions, vouchers, invoices and other material;
- Answers phones and directs calls to appropriate staff/department;
- Operates various office equipment;
- Furnishes information to the public and responds to requests and complaints;
- Enters and retrieves information in an automated information system;
- Assists with customer service for various requests and inquires received;
- Assists in verifying and reconciling account balances according to a prescribed procedure;
- Performs related work as required.

FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS:

- Good knowledge of modern methods used in maintaining financial accounts and records;
- Good knowledge of personal computers, spreadsheet software and billing software and office equipment;

- Good knowledge of office terminology, procedures and equipment;
- Good knowledge of English, spelling and arithmetic;;
- Good knowledge of personal computers and office equipment;
- Ability to understand and carry out oral and written directions;
- Ability to perform mathematical computations quickly and accurately;
- Ability to write legibly;
- Ability to use communications and telephone equipment;
- Ability to communicate in a clear and concise manner both verbally and in writing;
- Ability to deal calmly and effectively with co-workers and the public;
- Ability to organize, direct and coordinate work activities and materials;
- Good judgment in dealing with co-workers and the public;
- Clerical aptitude;
- Neatness;
- Tact and courtesy;
- Reliability;
- Integrity;
- Accuracy;
- Physical condition commensurate with the requirements of the position.

MINIMUM QUALIFICATIONS:

- A. Graduation from a regionally accredited or New York State registered college or one accredited by the NYS Board of Regents to grant degrees with an Associate's Degree (or higher) and one (1) year fulltime paid experience in the area of customer service or related field which shall have included the maintenance of financial accounts and records; **OR**
- B. Graduation from high school or possession of a high school equivalency diploma and three (3) years fulltime paid experience in the area of customer service or related field which shall have included the maintenance of financial accounts and records; **OR**
- C. Any equivalent combination of training and experience as described by (A) and (B) above.