

**CUSTOMER ACCOUNT REPRESENTATIVE PROGRESSION & PRODUCTIVITY
PROGRAM
CRITERION DOCUMENT**

Revised July 12, 2001
Revised February 9, 2006

Note: Refer to the Customer Account Representative Progression & Productivity Program Policies and Procedures Document for additional information and clarification of requirements, guidelines and procedures.

To Become: CUSTOMER ACCOUNT REPRESENTATIVE I OT-15
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EDUCATION: High School or GED

EXPERIENCE: One (1) year of general office experience in work involving direct customer contact

TRAINING: Successful completion of the Utilities Services New Hire Training

DEMONSTRATED SKILL PROFICIENCY:

Pass entry-level selection skills tests

JOB COMPLEXITY:

Performs entry-level customer account duties in accordance with established policies and procedures under immediate supervision.

<i>Proficiency Increase:</i>

An increase to the next step within the OT-15 pay grade will be awarded to employees who successfully complete and receive certification for a total of two (2) Utilities Services Operational functions.

To Become: CUSTOMER ACCOUNT REPRESENTATIVE II OT-16

EDUCATION: High school or GED plus required coursework

EXPERIENCE: Two (2) years of experience in work involving direct customer contact

TRAINING:

Internal: Human Relations Core Group = 1 Course from choices
Communication Skills Core Group = 1 Course from choices

Unit: Successful completion of the Utilities Services training in two (2) Utilities Services functions resulting in operational certification in two (2) functions

COURSEWORK: Two (2) one-hour software courses (including at least one basic and one intermediate course covering (total = 6 hours) the same type of software) ex. of software is word processing, spreadsheet, database, etc., plus One (1) one-hour basic grammar course

OR

Computer Concepts/Microcomputer Fundamentals Lab combined course = 3 hours

AND

One 3-hour course out of the following list of choices:

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|---------------------------------|-------------------------------|
| *Technical/Professional Writing | *Government |
| *Business Communications | *Freshman Composition I or II |
| *Business Math | *Accounting I |

DEMONSTRATED SKILL PROFICIENCY:

- Pass a standard test at the basic level on one of the following software packages trained on:
Word Processing
Spreadsheet
- Demonstrated proficiency in up to two (2) operational functions

JOB COMPLEXITY:

Performs general to more complex customer account duties using standard techniques and skills utilizing some independent judgment.

PERFORMANCE & PRODUCTIVITY:

Must have received a rating of "Proficient" or above on last final review immediately prior to making application for progression

<i>Proficiency Increases (once OT-16 level achieved):</i>
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- 1.) *An increase to the next step within the OT-16 pay grade will be awarded to employees who successfully complete a total of (12) accredited hours in addition to previous certification for a total of four (4) Utilities Services Operational functions.*
- 2.) *An increase to the next step within the OT-16 pay grade will be awarded to employees who successfully complete a total of (15) accredited hours and receive certification for two (2) additional Utilities Services Operational functions for a total of six (6) functions.*
- 3.) *An increase to the next step within the OT-16 pay grade will be awarded to employees who successfully complete and receive certification for three (3) additional Utilities Services Operational functions for a total of nine (9) functions.*

To Become: CUSTOMER ACCOUNT REPRESENTATIVE III OT-17

EDUCATION: High school or GED plus required coursework

EXPERIENCE: Three (3) years of experience

TRAINING: **Internal:** Human Relations Core Group = 1 Course from choices
Supervisory Skills Core Group = 1 Course from choices

Unit: Successful completion of all nine (9) Utilities Services Operational functions

COURSEWORK: Any combination of the following to complete at least six (6) hours of required computer software (total = 20 hours) coursework:

Two (2) one-hour software courses (including at least one basic and one intermediate course covering the same type of software) example: software is word processing, spreadsheet, etc., plus One (1) one-hour basic grammar course

OR

Computer Concepts/Microcomputer Fundamentals Lab combined course = 3 hours

OR

Intermediate Electronic Spreadsheet Course = 3 hours

AND

One 3-hour course out of the following choices that has not been already used to become a Customer Account Representative II:

- *Technical/Professional Writing
- *Business Communications
- *Business Math
- *Government
- *Freshman Composition or II
- *Accounting I

Note: An Advanced Course in the area of Math or English may be substituted.

DEMONSTRATED SKILL PROFICIENCY:

- Pass a test on City Personnel Policies & Procedures - Sections 100, 200, 300, 400, 700, 800
- Pass a standard test at the intermediate level on one of the following software package examples trained on:

Intermediate Computer Software Applications (ex. Word Processing, Spreadsheet, etc.)

- Demonstrated proficiency in three (3) Utilities Services operational functions for a total of nine functions

JOB COMPLEXITY:

Performs general to complex customer account representative duties requiring advanced technical knowledge and customer service skills with little supervision, requiring independent judgment on a frequent basis.

PERFORMANCE & PRODUCTIVITY:

Must have received a rating of "Proficient" or above on last final review immediately prior to making application for progression.