

Job Description Questionnaire

The purpose of the Job Description Questionnaire (JDQ) is to provide the information necessary to evaluate jobs for salary placement, classify jobs for various legal requirements, and to compile appropriate job descriptions.

Please read this JDQ carefully before answering any of the questions and then complete it as accurately, completely, and briefly as possible. While it is not necessary to describe each duty in great detail, it is important to provide sufficient information so the job can be accurately evaluated and classified. Keep in mind that *the purpose of the JDQ is to collect information about the job and is not designed to evaluate employee performance.*

Consider the typical responsibilities of the job; even those that might only occur cyclically (e.g. annually, quarterly, etc.). The responses should be based on duties and responsibilities that are part of the job under typical conditions, not special projects or temporary assignments. Further, unless specifically directed by management, describe the job as it is today, not as you believe it should be or what it might be in the future.

SECTION 1		DEMOGRAPHIC INFORMATION	
Employee Name	Lori Bachler	Employer Name	City of Watertown
Job Title (CHANGE)	(Utility Business Office Manager) (Accounting Manager) / Utility Clerk	Work Location	Water & Wastewater Business Office
Department	Water & Wastewater	Division	Water & Wastewater Utilities
Full-Time / Part-Time	Full-Time	Part-Time (Hrs per Wk)	40
Supervisor Name	Peter Hartz	Supervisor Title	Water Systems Manager

SECTION 2

DESCRIPTION OF ESSENTIAL DUTIES & RESPONSIBILITIES

Identify the essential duties / responsibilities of your job, which should be the most important aspects of the job. This section is focused on WHAT is done rather than HOW it is done. Use wording that will provide as clear an understanding as possible for someone not familiar with your work. Avoid terminology or acronyms that are not widely known outside of your line of work. Please list those duties that you feel are most important at the top of the list, and list the estimated percentage of the total annual time that each item takes. *(Remember, as a rule-of-thumb, that 10% equates to roughly 200 hours of a work year.)* To the extent possible, try to identify those duties and responsibilities that account for as close to 100% of your work time as possible. While catch-all categories are acceptable (e.g. misc. duties, other duties as assigned, etc.), those sections will likely NOT be evaluated.

Frequency Codes: Daily [D] / Weekly [W] / Bi-Weekly [B] / Monthly [M] / Quarterly [Q] / Annually [A] / As Needed [N]

Primary Duties (essential accountabilities)	Frequency	% of Annual Total Time
<p><u>Financial Responsibilities:</u></p> <ul style="list-style-type: none"> • Tracking Revenue Income From Rates: Ensuring that revenues include user charges, utility liens added to taxes, connection fees, betterment assessments, miscellaneous fees, interest earnings, and other financing sources. • Prepare and file reports and correspondence: Able to prepare and file various reports and correspondence related to utility billing, such as monthly revenue reports, delinquent account notices, collection letters, or refund requests. Able to communicate with other departments or agencies, such as finance, public works, or regulators. • Create and manage an office budget: Able to plan and allocate funds for various office expenses, such as utility bills, maintenance contracts, equipment purchases, and employee salaries. Track and report on the actual spending and identify any variances or opportunities for savings. • Monitor and reconcile utility budgets: Able to review and verify the invoices from utility providers and vendors and ensure they match the agreed-upon rates and service levels. Resolve any discrepancies or disputes in a timely manner and report on the monthly utility costs and usage. • Manage service contracts: Materials inventory for the Department of Natural Resources for all utility and privately owned service lines and the lead service line replacement contract support. 	D	32.5
<p><u>Water & Wastewater Utility Billing day to day jobs:</u> Calculate, print, correct, burst, sort, prepare and mail city utility bills which requires all of the following:</p> <ul style="list-style-type: none"> • Import reads into utility billing system & meter change out reads are entered and calculated correctly. • Analyze consumption journals, send letters for high consumptions and create work orders for non-registering meters. • Enter reads for manually read meters. • Calculate bills for back billing if meters were not working or calculate refunds if needed for misreads. 	D	32.5%

<ul style="list-style-type: none"> • Check and update zip+4 on customer accounts. • Change service rates at the correct time after rate increases are approved. • Provide usage information to Lab Manager and calculate and add sewer surcharge fees to bills • Make sure annual fees are billed at the correct time. • Add, change and delete customer records for water, sewer, fire protection, garbage and storm water utility charges. Create and update spreadsheets for review and budget purposes for Street Department (garbage and storm water utilities) and gather information for rate changes for our Auditors for water, sewer and fire protection. • Correct/adjust bills for refunding overpayments, calculating credits, etc. • Maintain customer checking/savings account information for automatic withdrawals on the due date. • Add penalties after the due date and reapply amounts due, fees and penalties for non-sufficient funds, closed bank accounts, etc. • Update and check payments made on-line through our third-party payment processor. • Go through County Assessor changes for both Dodge and Jefferson Counties and make changes to maintain customer addresses, ownership changes and parcel ID numbers. • Set up new accounts and mail welcome letter of payment options, water, money and time saving tips • Serve as Administrator to maintain user ID, password, access and rights to Caselle Utility Billing program, Payment Service Network web site, and Acuity Scheduling web site. 		
<p><u>Business Office/ Customer Service Management:</u> Assist administrative assistant with all day-to-day operations and functions of the water business office and customer service as it relates to all subsections of the utility (operations, distribution, meter shop, and business office). Compose and track customer correspondence in regard to cross connection control program, meter change outs, high water usage, private leak repairs, special utility projects and programs, winter run allowance, and customer complaints. Must also follow-up in a timely manner as necessary based on the notification time period. Serve as secondary back up for payroll, accounts payable and accounts receivable. Answer customer phone calls, set up appointments, do final bills, assist with coding accounts receivable for invoicing, assist customers with making payments, picking up deduct meters and explain how to locate leaks within their homes. Create itinerary and gather work orders for next day for Water Department Personnel.</p>	D	10%
<p><u>Create and Delegate Meter Shop Work Orders:</u> Create work orders for department staff as necessary and confirm its completion. If the work order is complaint driven, follow up with the complainant to verify their satisfaction. Prioritize the work orders as necessary based on severity to minimize damage and water service disruption. Create work orders and mail letters to customers for meter change-outs/upgrades when needed (900 or more each year). Maintain meter testing schedule. Maintain customer accounts with old and new meter reads and meter records, maintain meter inventory and test records for the Public Service Commission (PSC). Order meters, meter transmitters and other meter parts when needed and maintain physical inventory so that meters and parts are available when needed.</p>	D	10%
<p><u>Assist the Water Systems Manager</u> in any capacity necessary to obtaining current and historical; records, data, account balances, contract documents, and all other information as determined necessary by the Water Systems Manager to facilitate and maintain the everyday operations of the utility. Provide statistical information to the manager on a monthly basis or as needed to complete reports. Assist the manager in the annual budget preparation</p>	N	5%

process based on annual expenditure data related to water meter purchases and other office supply expenses.		
Public Service Commission Water Utility Reporting: Create, route and process job orders, code them with PSC account numbers and calculate truck and inventory expenses for City Hall, the PSC and auditors. Maintain water loss, service, water main and hydrant inventory from these job orders. Calculate miscellaneous accounts receivable charges from work orders (hydrant meter usage, turn-ons, etc.), code with PSC account numbers and add charges to utility account or give to accounts receivable dept. for invoicing. Maintain customer class information and continuing property records for the Public Service Commission. File work orders, cross connection reports and other paperwork. Clean out files and create new files at the end of the year. Maintain record retention information and decide when records can be destroyed.	D	5%
City of Watertown Clerk Office related management: Process and determine if and what amounts need to be written off for bankruptcies and if they need to be sent to the City Attorney for filing. Maintain impact fee records and mail letter of utility rules to builder/owner. Maintain petty cash for Water Utilities business office. January: Create inventory count spreadsheet, update after count is complete and adjust inventory – email adjustments to City Hall for General Ledger update. September-November: Create and check tax roll for delinquent amounts to be sent to property taxes, create Excel files, print and mail letters to property owners, landlords and tenants by October 15 th . Get reports ready for the Post Office and create daily reports for City Hall and Customer Service Rep. Add the 10% penalty on November 1 st , run reports and remove balances on November 15 th . Mail certified list of utility lien to Dodge and Jefferson County as per Wis. Statute.	N	5%

SECTION 3	TOOLS AND TECHNOLOGY
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Identify any software, technology, equipment or machinery utilized on a regular basis in order to perform the functions of the job:

Microsoft Suite (Office 365, Word, Excel, Access, Outlook, PowerPoint, Publisher, SharePoint Workspace, InfoPath Designer).
 New Utility record keeping software. (in the process of researching and acquiring new software package)
 Web Access Management System (WAMS): Switchboard, PWS Data Viewer
 DNR's Natural Heritage Inventory (NHI) Public Portal, with Surface Water Data Viewer
 Proprietary Advanced Meter Analytics software: Badger ReadCenter & Beacon AMA.
 Geographic information system: ESRI's ArcGIS version 10.3.1., City of Watertown, Counties of Jefferson and Dodge GIS mapping & Ascent Land Records Suite
 Communication: CC&N communication software with telephone, smart phone, CB radios, fax machine
 Miscellaneous office Equipment: laptop computer, printer, copier, scanner, automatic bill folder/stuffer, calculator
 HydroSoft (HydroCorp online reporting software), Adobe, Skype

Civic Systems software package which includes: utility billing, ACH direct pay, electronic read interface, service orders, splitter, tax certification, online bill pay and bill presentation, and cash receipting.

Public Service Commission web site access administrator for annual water report.

SECTION 4

JUDGMENTS / DECISION-MAKING

Identify at least five of the most typical judgments/decisions that you make in performing your job as well as the solutions to these problems. Please also describe the resource, input or guidance others provide in arriving at your decision and who reviews, if anyone.

Typical Problems/Challenges	Possible Solution(s) to Problem/Challenge	Resources Available and/or Used	Job Title of Who Reviews
Managing Time & Added Responsibilities, Adapting to New Technology	Make proper use of time, investigate, audit, and revise current workflows to be more efficient. Research potential new software that could improve utility function. Maintain a well-managed calendar and office space, develop processes. Limit interruptions. Revise systems and processes and adapt to new change.	Educational seminars, on the job experience, coworkers	Water Systems Manager
Monitoring and managing 8,556 customer accounts for abnormal water usage, or water quality problems. Then determining if that water usage or water quality is in fact abnormal along with its priority. Then deciding who and when to dispatch.	Institutional knowledge of standard water consumption helps when prioritizing and determining a course of action. Dispatching the appropriate resources to handle the situation.	Distribution crew leader, and water utility general manager. AMA software, HTE software, phone, GIS mapping.	Water Systems Manager
Handling upset or irate customers regarding an array of different problems. Determining how to help and documenting interactions.	Listening to the customer and being understanding is most important. Investigate their claims to fully understand the issue. Then make the best decision to help based on all the factual information.	Dealing with Difficult People and Communication seminars, past experiences, computer software, and coworkers	Water Systems Manager
Maintaining meter changeout and testing schedules and deadlines while providing customer service and performing other daily tasks.	Task need to be prioritized and delegated appropriately in order to meet deadlines.	Calendar, prior training, phone, coworkers, software, utility staff	Water Systems Manager
Work order inconsistencies with actual field observations or notes	Modify / change work orders to reflect as-built conditions	Interdepartmental communication skills	Distribution crew leader, assistant manager, manager

involving water infrastructure needed for inventory records.			
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SECTION 5	WORKING RELATIONSHIPS / INTERACTIONS / CONTACTS
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Please identify your typical work relationships with other persons inside or outside of your own organization.

Title of Individuals With Whom You Typically Interact	Describe the Interaction	Why Was It Necessary?
Water Systems Manager	Daily conversations, weekly staff meetings, and special project meetings as necessary.	Keep the Manager informed of current utility status as it relates to billing and customer service, discussing issues and potential resolutions to those issues. Planning to progress the utility.
Water Utility Personnel	Daily conversations (phone, person, email) regarding customer service issues and procedures, product procurement and how it relates to the budget, work order status, coordinate work schedules.	Help to maintain the efficiency between interdivisions. Ensure equipment and materials are available on-time to accomplish the necessary work. Ensure high quality customer service and resolve issues. Keep employees on task and performing satisfactory work. Monitor meter installation and testing progress completed by staff and analyze the impact to schedule and adjust as necessary.
City Clerk's Office	Share knowledge of customer accounts, assist with answering questions regarding fees and payments, as well as abnormal water consumption.	Provide excellent customer service and ensures customer service continuity.
Administrative Assistant I	Daily discussions on missing / incorrect information associated with customer accounts to include personal information, meter serial numbers, reading equipment and meter test circles. Conversation take place every day regarding high/low reads or no reads, duplicate bill requests, winter run allowance, pool fills, processing off cycle bills, special assessments, & initial / final account reads.	The Administrative Assistant I is an important integral part of the day to day operations of the utility. Its extremely important that information is transferred correctly and timely to ensure customers are getting an accurate bill on time. Accuracy is also extremely important to ensure the proper meter reading is being applied to the correct account, and the customer is getting billed the appropriate amount, so the utility does not lose out on revenue.
City Inspections Department	Verify plumbers have permits for work they are doing on new constructions and repairs. Answer questions regarding water consumption at properties. Coordinate turning off the service to vacant or abandoned properties.	Ensure that plumbers, contractors, and home owners are following building codes to the best of our knowledge, water is not being stolen, and there are no issues when razing a property. Eliminate any potential health hazards by a building being occupied with no water service.
Landlords, homeowners, apartment managers, and	Information regarding final bills and changes in service for their tenants, they also monitor account	To keep the property owners informed of their property status. Coordinate work on the property that needs to be

management companies.	balances for their tenants to be sure they are paying their bills.(unpaid utility bills rollover on to the property taxes) Leak notifications, meter change out letters, or other water related issues related to the property. Questions pertaining to utility special programs.	done by utility staff. Resolve issues with equipment, or utility related issues with the property.
Homeowners and tenants	Change account information, transfer services, billing issues and questions, account balances and payments. Questions regarding water quality, potential leaks, and special programs offered by the utility. Notifications about water main failures in their neighborhoods or water service disruptions.	Ensure accurate and up to date billing and account information. Minimize private property damage and water loss. Resolve any utility issues quickly. Assist the property owner in saving money and improving their property by taking advantage of special programs.
Plumbers, engineers, contractors and excavators.	Coordinate shutting off water, locating facilities, installation/removal of service meter as well as rental meters. Answer questions and assist with paper work submittal for special programs.	Enables new or repair work can be accomplished on private property safely and easily. All water is being billed and accounted for. Protection of the water distribution system. Correct paperwork is submitted on time and to the correct person so homeowners can benefit.
Real estate agents, title companies, bank personnel	Provide information about account status, and outstanding balances. Obtain documentation to provide to lenders. Answer questions regarding lead service line replacement program. Transfer accounts in between property sales. Activate or deactivate water service to properties for property sales or inspections. Coordinate the winterization of vacant homes.	Guarantee accounts are paid in full prior to property sales. Obtain the status of properties listed by the agent. Facilitate smooth transaction of property sales. Protect private property.

SECTION 6		SUPERVISION / MANAGEMENT		
Please indicate the type of responsibility you have as it pertains to leading others.				
Area of Action / Responsibility	Yes	No	Provides Input	
Screen / Interview Applicants		X		
Hire / Promote Employees			X	

Provide Written/Verbal Warnings		X	
Suspend Employees		X	
Terminate Employees		X	
Prepare Work Schedules For Others	X		
Project Management		X	
Provide Work Direction For Others	X		
Evaluate Performance Of Others	X		
Counsel Employees			X
Train Employees (As Part Of The Normal Duties Of The Job)	X		
Approve Overtime		X	
Approve Time Off Request For Others		X	
Develop / Implement Policies	X		
Do you <u>directly</u> supervise any employees?	X		
Job Title	# of FTEs		
Assistant Utility Billing Clerk	1.0		

SECTION 7

WORK ENVIRONMENT / PHYSICAL REQUIREMENTS

Please indicate the amount of time typically spent in the following categories.

Physical Requirements	[Place an "X" in the appropriate cells]			
	N/A	Rarely	Occasionally	Frequently
Carrying/Lifting 10 - 40 Pounds		X		
Carrying/Lifting > 40 Pounds	X			
Sitting				X
Standing / Walking / Climbing			X	
Squatting/Crouching/Kneeling/Bending		X		
Pushing / Pulling / Reaching Above Shoulder			X	

Work Environment	N/A	Rarely	Occasionally	Frequently
Indoor/Office Work Environment				X
Noise >85dB (e.g. mower, heavy traffic, milling machine, etc.)	X			
Extreme Hot/Cold Temperatures (>90 degrees / <40 degrees)	X			
Outdoor Weather Conditions			X	
Hazardous Fumes or Odors / Toxic Chemicals	X			
Confined Spaces (as identified by OSHA)	X			
Close Proximity to Moving Machinery / Equipment	X			
Bodily Fluids / Communicable Diseases		X		
Working Alongside Moving Traffic on Roads	X			
Electrical Hazards	X			

SECTION 8

ADDITIONAL EMPLOYEE COMMENTS

Please identify any other information that would help someone else understand your job more clearly:

Here is a detailed list of type of tasks this position needs to understand and complete and cross-train the assistant clerk and administrative assistants in the departments. You should also have excellent communication, leadership, and problem-solving skills. You should be able to work under pressure and handle multiple tasks in a fast-paced environment and knowledge of utility operations, equipment, and regulations.

Assessor Address Changes	Training on utility billing, read center, tax cert, etc.
Baker Tilly Audit (not PSC report)	Utility Billing (admin) change/add users, etc.
Bankruptcies	Utility Billing change/add service order forms
Billing, penalties, adding meter reads, etc.	Utility Billing report writer
Consumption journals - leak letters, no registers	Vacant property tracking (water off), cold weather letters
Continuing Property Records (Asset Mgmt)	Water loss tracking
Cross Connection (Residential/Sm. Comm)	Water Main Inventory

Distribution Inventory (Materials Mgmt)	Welcome Letters
Hydrant Inventory	Accounts Payable
Large meter test schedule	Payroll
Mail delivery to employees	Private Well Registration every 5 years
Meter replacement schedule & letters	Turner Hall Registration for June Seminar
Meter changes in utility billing	Cash Receipt stubs (check for addr chgs)
Meter inventory, ordering, etc.	Cross Connection (HydroCorp)
New construction letters / impact fees	Customer Phone Calls
PSC Report	Customer Assistance - in person
Payment Service Network (PSN) administrator	Deferred Payment Agreements
Rate Changes in Utility Billing & Tracking	Digger Hotline Tickets (printing/routing)
Read Center	Final Bills
Reapplying NSF payments	Landlord Notices
Server IT person	PSN payments
Service Inventory	Website changes
Stop box program record keeping	Closing & Filing work orders & Diggers Hotline tickets
Stormwater changes/additions to billing/tracking	Garbage changes/additions to billing/tracking
Tax Roll-over	Inventory & Truck Expensing

To calculate, process and mail city utility bills correctly and in a timely manner. Notify customers and property owners of past due amounts and transfer balances to City Hall for collection on property taxes. Handle bankruptcy changes set up and maintain customer accounts. Code work orders and add miscellaneous Accounts Receivable to customer accounts if possible, to limit the amount of invoicing needed. Maintain billing, cross-connection and other customer records, inventory and other expenses for City Hall and our Auditors for the Public Service Commission Report.

The most important impact of this position is maintaining cash flow by billing customers correctly and on-time by scheduling meter changes in a timely manner to keep them working correctly and following timelines and procedures set up in State Statutes, City Municipal Code and United States Post Office Rules and Regulations and maintaining records for Public Service Commission reports and rate increases.

TO BE COMPLETED BY THE EMPLOYEE'S SUPERVISOR

SECTION 9

SUPERVISOR INFORMATION

Supervisor Name	Peter Hartz	Supervisor Title	Water Systems Manager
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SECTION 10	<u>EDUCATION REQUIRED FOR HIRE</u>
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	Level of Education (Select one with an "X")	Field(s) of Study
	Less than High School Education	
	High School Education (or Equivalent)	
	One Year Certificate (or Equivalent)	
X	Associate's Degree (or Equivalent & Experience)	Administrative Professional, Accounting, or Equivalent experience Financial
X	Bachelor's Degree (Preferred)	Finance, Accounting, Business Administration
	Master's Degree	
	Professional Degree (Law, Medicine, etc.)	
	PhD w/ Dissertation	
	Other:	

Provide Any Additional Information Regarding the Required Education (e.g. preferred vs. required, specific coursework, etc.):

Bachelor's degree in business administration or related field preferred. Associate's degree and proven experience as an office administrator, office manager, or similar role in a utilities company or related industry. Proficient in MS Office, accounting software, and database systems. Excellent verbal and written communication skills. Strong organizational, time management, and multitasking skills. Attention to detail and accuracy. Ability to work independently and as part of a team. Knowledge of utility operations, equipment, and regulations.

Complete working knowledge of Microsoft Office, bankruptcy case basics, certificate received for training on programming and using meter reading handhelds, and certificates received for training completed on the following software: Connect, Read Center/Galaxy, Caselle Clarity billing, Waterscope, tax roll and meter management programs. Training is required on the following websites: Payment Service Network website, the United States Postal Service Postal One! website and Civic's customer support portal. Training on Public Service Commission, United States Post Office and City Municipal rules and regulations, training on using the bill burster and knowledge of payroll, accounts payable/receivable and Badger Meter metering devices. First aid and CPR Certification. Position is cross-trained on meter reading and changing remote registers and using the Trimble handheld for the Galaxy transmitters. Knowledge and ability to transfer information between multiple computer programs is also necessary. Minimum of Associates degree. Bachelor degree not required but preferred.

SECTION 11					TOTAL EXPERIENCE REQUIRED UPON HIRE		
[Place an "X" in the appropriate cells]							
No Experience	< 2 yr.	2 to 3 yrs.	4 to 5 yrs.	6 to 7 yrs.	8 to 9 yrs.	10 to 11 yrs.	≥ 12 yrs.
				X			
Describe Specific Experience Required for Hiring (e.g. 5 total years of customer service experience 2 of which were in a supervisory capacity):							
6-7 years administrative professional experience with emphasis on customer service and accounting							

SECTION 12		CERTIFICATION / LICENSURE / TRAINING TO PERFORM JOB	
List Required Certification/Licensure/Training	How Attained/Provided	Required Upon Hire?	May Obtain After Hire?
Microsoft Office Suite	Online	No	Yes (within 1 years)
Advanced Microsoft Office Suite Certification	Technical Course (MATC)	No	Yes (within 2 years)
CPR, First Aid, AED	Professional certification provided by a valid organization	Preferred	Yes
Describe any current practices as it relates to licensure or certification (e.g. extra pay for certification, employer payment for obtaining or renewing, etc.):			
Currently, the City covers costs associated with continued education as well as CPR, First Aid and AED training.			

SECTION 13		SUPERVISOR'S COMMENTS / CORRECTIONS / ADDITIONS	
In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.			
JDQ Section	Comment / Clarification / Addition		
ALL	The employee, my supervisor and I believe this job was not properly defined in 2020 to other Business Office Manager comparisons and the title did not change from Billing Clerk. I reviewed similar positions with other business operations and believe the description in the JDQ could be several, but Utility Business Office Manager (Accounting Manager) was chosen as a good comparison to the duties being performed in this position. Please take a closer look at other jobs of similarity and current market rates. Since the last review the responsibilities have changed with the addition of one (1) full-time equivalent employee under this person's direction. This form updates some information to explain the job and responsibilities.		

To BE COMPLETED BY ADMINISTRATIVE DESIGNEE

SECTION 14		SUPERVISOR INFORMATION	
Administrative Designee Name		Administrative Designee Title	

SECTION 15		ADMINISTRATIVE COMMENTS / CORRECTIONS / ADDITIONS	
In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.			
JDQ Section	Comment / Clarification / Addition		