



June 7, 2022

Kristin Urban  
Human Resources Manager  
City Service Commission Executive Secretary  
Department of Employee Relations  
City Hall, Room 706

RE: Request to Extend Probationary Period – Coates, Virginia

Dear Ms. Urban:

The Milwaukee Water Works (MWW) respectfully requests to extend the probationary period for Virginia Coates, who was recently promoted to the position of Accounting Assistant III effective April 3, 2022, with a 6-month probationary period to end on October 3, 2022.

Ms. Coates previously held the position of Customer Service Representative III in MWW's Customer Service unit. Due to a severe staffing shortage – 5 of 9 positions were already vacant – Ms. Coates continued her former duties before beginning training in her new position on May 16, 2022.

Because of the 6 week delay in beginning the training and duties of an Accounting Assistant III, MWW requests the probationary period be extended by 6 weeks, to November 14, 2022. Ms. Coates is a solid employee and possesses the skills necessary to succeed in her new position, and MWW would like to ensure she has the benefit of a full 6-month probationary period to demonstrate that she can meet all job requirements. Ms. Coates has been provided with an informal review of her work during the first 3 weeks of training, and informed of MWW's request to extend her probationary period.

Thank you for your consideration. If you have any questions or concerns, please contact me (x2802 or [Patrick.Pauly@milwaukee.gov](mailto:Patrick.Pauly@milwaukee.gov)) or Amy Hefter, Water Works Personnel Officer (x2805 or [ahefte@milwaukee.gov](mailto:ahefte@milwaukee.gov)).

Sincerely,

A handwritten signature in black ink that reads "Patrick W. Pauly".

Patrick W. Pauly, P.E.  
Interim Superintendent / Water Administration Manager

Cc: Dan Thomas, Daniel Rotar, Jane Islo

## JOB DESCRIPTION

**Instructions:** Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

### FOR DER USE ONLY

**Vacancy No.**

City Service  
Commission:  
Fire & Police  
Commission:

Finance  
Committee:  
Common  
Council:

<b>1. Date Prepared/ Revised:</b> 4/4/18	<b>2. Present Incumbent:</b> Standard	<b>Is incumbent underfilling position?</b> YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> <i>If YES, indicate Underfill Title in box 10.</i>	
<b>3. Date Filled:</b>	<b>4. Previous Incumbent:</b> Patricia D'Amico		
<b>5. Department:</b> Public Works		<b>Bureau:</b>	<b>Unit:</b> Billing
		<b>Division:</b> Water Works	<b>Section:</b> Business
<b>6. Work Location:</b> 841 N. Broadway, Room 409		<b>Telephone:</b>	<b>Work Schedule:</b>
		<b>Email:</b>	Hours: 8:00am – 4:45pm Days: Monday-Friday
<b>7. Represented by a Union?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>8. Bargaining Unit:</b> District Council 48 If in District Council 48, which local?		<b>9. FLSA Status (check one):</b> <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt
<b>10. Official Title:</b> Accounting Assistant III	<b>Pay Range</b>	<b>Job Code</b>	<b>EEO Code</b>
<b>Underfill Title (if applicable):</b>	5EN		
<b>Requested Title (if applicable):</b>			
<b>Recommended Title (DER Use Only):</b>		<b>Approved by:</b>	
		<b>Date:</b>	

### 11. BASIC FUNCTION OF POSITION:

–The Accounting Assistant III position is responsible for performing timely and accurate pre-billing review of all customer accounts before actual bills are generated, looking for unusual items such as high, negative or no consumption reporting, etc. Conduct inquiries to resolve any discrepancies and make corrections/entries in enQuesta billing system in a timely manner.

### 12. DESCRIPTION OF JOB (Check if description applies to **Official Title** ☒ or **Underfill Title** ☐):

#### A. ESSENTIAL FUNCTIONS/Duties and Responsibilities: (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
60	Perform a detailed pre-billing review of up to 15,000 accounts on a weekly basis to identify unusual consumption reporting such as high, negative or zero consumption. Resolve any discrepancies with accurate entries to the Milwaukee Water Works Customer Information System (CIS).
15	Post necessary read/other billing adjustments to customer accounts in accordance with Milwaukee Water Works and the Wisconsin Public Service Commission (PSC) regulations. Adjustments may include but not limited to back billing, over/under estimates, meter test adjustments, damaged meter charges, etc. Prepare customer correspondence tailored to the specific request or type of adjustment.
15	Contact investigators at Meter Services to resolve reading errors/issues, ensuring proper protocols are followed in order to not delay the billing process. Follow up with corrective actions. Communicate with suburban utilities serviced by Milwaukee Water Works to resolve any billing requests, disputes, changes, etc. for proper billing of those accounts. Be a resource person for Customer Service Representative III's to answer and assist with complex billing questions regarding large commercial and industrial customers.

The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.

% of Time	ESSENTIAL FUNCTION
10	Process /work with well surveys, monthly and weekly bill mailings, suburban billing, work order updates; daily adjustment, fire line and set tickets reviews and other special projects. Complete necessary paper work for combination or division of accounts and reflect in the Customer Service Information System (CIS). Update water service lateral changes and numbers in the CIS.

**B. PERIPHERAL DUTIES:**

% of Time	PERIPHERAL DUTY

**C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:**

Water Billing and Collections Manager

**D. SUPERVISION RECEIVED:** (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

While general work assignments and methods follow standard outlines and procedures, the position works under the direction of the Water Billing and Collections Manager. The position will follow MWW policies and procedures and PSC regulations governing billing for utility services. Due to time constraints in the billing schedule, this position is allowed to use own discretion when updating meter readings. However, the Billing and Collections Manager will provide direction on more complex situations.

**E. SUPERVISION EXERCISED:**

Total number of employees for whom responsible, either directly or indirectly = 0.

**Direct Supervision:** List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

**F.**

a. Assign duties		e. Sign or approve work
b. Outline methods		f. Make hiring recommendations
c. Direct work in progress		g. Prepare performance appraisals
d. Check or inspect completed work		h. Take disciplinary action or effectively recommend such
<b>Number Supervised</b>	<b>Job Title</b>	<b>Extent of Supervision Exercised</b> <i>(Select those that apply from list above, a - h)</i>

**F. MINIMUM QUALIFICATIONS REQUIRED:** (Indicate the MINIMUM qualifications required to enter the job.)

i. Education and Experience

Graduation from high school is the minimum requirement. Business or accounting course work at a technical college or business school is desirable. Four years of clerical experience with a minimum of one year at an Accounting Assistant II level. Must be detailed, accurate and organized to ensure proper billing practices. Strong organizational skills and an aptitude for working with numbers. Solid experience working with computers and application software (Microsoft Office products).

ii. Knowledge, Skills and Abilities

Familiarity with City of Milwaukee, the PSC and Water Works billing policies and procedures along with customer service skills, ability to work well others as a team member; ability to work effectively under strict deadlines and varying priorities.

*The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.*



iii. Certifications, Licenses, Registrations

None

iv. Other Requirements

**13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED**

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

**G. PHYSICAL ACTIVITY OF THE POSITION:** (List the physical activities that are representative of those that must be met to successfully perform the essential functions of the job).

**CHECK ALL THAT APPLY:**

<input type="checkbox"/>	<b>Climbing:</b> Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing required exceeds that required for ordinary locomotion.
<input type="checkbox"/>	<b>Balancing:</b> Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.
<input type="checkbox"/>	<b>Stooping:</b> Bending body downward and forward by bending spine at the waist. Check only if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
<input type="checkbox"/>	<b>Kneeling:</b> Bending legs at knee to come to a rest on knee or knees.
<input type="checkbox"/>	<b>Crouching:</b> Bending the body downward and forward by bending leg and spine.
<input type="checkbox"/>	<b>Crawling:</b> Moving about on hands and knees or hands and feet.
<input checked="" type="checkbox"/>	<b>Reaching:</b> Extending Hand(s) and arm(s) in any direction.
<input type="checkbox"/>	<b>Standing:</b> Particularly for sustained periods of time.
<input type="checkbox"/>	<b>Walking:</b> Moving about on foot to accomplish tasks, particularly for long distances.
<input type="checkbox"/>	<b>Pushing:</b> Using upper extremities to exert force in order to draw, press against something with steady force in order to thrust forward, downward or outward.
<input type="checkbox"/>	<b>Pulling:</b> Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
<input type="checkbox"/>	<b>Lifting:</b> Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. Check only if it occurs to a considerable degree and requires substantial use of the upper extremities and back muscles.
<input checked="" type="checkbox"/>	<b>Fingering:</b> Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm, as in handling.
<input type="checkbox"/>	<b>Grasping:</b> Applying pressure to an object with fingers and palm.
<input type="checkbox"/>	<b>Feeling:</b> Perceiving attributes of objects such as size, shape, temperature or texture by touching with the skin, particularly that of the fingertips.
<input checked="" type="checkbox"/>	<b>Talking:</b> Expressing or exchanging ideas by means of the spoken word. Those activities which demand detailed or important instructions spoken to other workers accurately, loudly or quickly.
<input checked="" type="checkbox"/>	<b>Hearing:</b> Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral communication and make fine discriminations in sound.
<input checked="" type="checkbox"/>	<b>Repetitive Motions:</b> Substantial movements (motions) of the wrist, hands, and/or fingers.
<input type="checkbox"/>	<b>Driving:</b> Minimum standards required by State Law (including license).

**H. PHYSICAL REQUIREMENTS OF THE POSITION:** (List the physical requirements that are essential functions of the job.)

**CHECK ONE:**

<input checked="" type="checkbox"/>	<b>Sedentary Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
-------------------------------------	--

*The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.*

<input type="checkbox"/>	<b>Light Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated for Light Work.
<input type="checkbox"/>	<b>Medium Work:</b> Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Heavy Work:</b> Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Very Heavy Work:</b> Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

**I. VISUAL ACUITY REQUIREMENTS:** (List the visual acuity requirements that are essential functions of the job.)

**CHECK ONE:**

<input checked="" type="checkbox"/>	<b>Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative:</b> This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
<input type="checkbox"/>	<b>Machine Operators, Mechanics, Skilled Tradespeople:</b> This is a minimum standard for use with those whose work deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.)
<input type="checkbox"/>	<b>Mobile Equipment Operators:</b> This is a minimum standard for use with those who operate cars, trucks, forklifts, cranes, and high lift equipment.
<input type="checkbox"/>	<b>Other:</b> This is a minimum standard based on the criteria of accuracy and neatness of work for janitors, sweepers, etc.

**J. THE CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:**

List the environmental/working conditions to which the employee may be exposed while performing the essential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating shift, etc.

Approximate Percentage of time performing field work: 0 %

**CHECK ALL THAT APPLY:**

<input checked="" type="checkbox"/>	<b>None:</b> The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).
<input type="checkbox"/>	<b>The worker is subject to inside environmental conditions:</b> Protection from weather conditions but not necessarily from temperature changes (i.e. warehouses, covered loading docks, garages, etc.)
<input type="checkbox"/>	<b>The worker is subject to outside environmental conditions:</b> No effective protection from weather.
<input type="checkbox"/>	<b>The worker is subject to extreme cold:</b> Temperatures below 32 degrees for period of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to extreme heat:</b> Temperatures above 100 degrees for periods of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to noise:</b> There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
<input type="checkbox"/>	<b>The worker is subject to vibration:</b> Exposure to oscillating movements of the extremities or whole body.
<input type="checkbox"/>	<b>The worker is subject to hazards:</b> Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals.
<input type="checkbox"/>	<b>The worker is subject to atmospheric conditions:</b> One or more of the following conditions that affect the respiratory system or the skin: Fumes, odors, dust, mists, gases or poor ventilation.
<input type="checkbox"/>	<b>The worker is subject to oil:</b> There is air and/or skin exposure to oils and other cutting fluids.
<input type="checkbox"/>	<b>The worker is required to wear a respirator.</b>

**K. MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION:**

List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)

*The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.*



**CHECK ALL THAT APPLY:**

<input type="checkbox"/> Camera and photographic equipment	<input checked="" type="checkbox"/> Office Equipment (desk, chair, telephone, etc.)
<input type="checkbox"/> Cleaning supplies	<input checked="" type="checkbox"/> Office supplies (pens, staplers, pencils, etc.)
<input type="checkbox"/> Commercial vehicle	<input checked="" type="checkbox"/> Packing materials (boxes, shrink wrap, etc.)
<input type="checkbox"/> Data processing equipment	<input checked="" type="checkbox"/> PC equipment (monitor, keyboard, printer, etc.)
<input type="checkbox"/> Handcart	<input checked="" type="checkbox"/> PC software
<input type="checkbox"/> Hand tools <i>(please list)</i> :	
<input checked="" type="checkbox"/> Office Machines <i>(check all that apply)</i> : <input checked="" type="checkbox"/> Copier <input checked="" type="checkbox"/> Facsimile <input checked="" type="checkbox"/> Calculator <input type="checkbox"/> Cash register	
<input type="checkbox"/> Other <i>(please list)</i> :	

- L. **SUPPLEMENTARY INFORMATION:** (Indicate any other information which further explains the importance, difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such as personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)

Must be able to work as a member of a team to solve problems and prepare meter reading information for accurate and timely billing. Must be able to work under pressure to meet deadlines and manage multiple priorities. Must be professional in conduct and appearance.

- M. **I believe that the statements made above in describing this job are complete and accurate.**

 4.27.18

\_\_\_\_\_  
*Signature of Department Head or Designated Representative*