

CUSTOMER SERVICE REPRESENTATIVE I/II

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under supervision, performs a variety of routine to complex customer service functions, including providing information, researching problems, performing collections and making credit arrangements on customer accounts, answering customer inquiries and resolving complaints, receiving payments, issuing receipts, inputting data into the computer, and generating service orders.

DISTINGUISHING CHARACTERISTICS

This series class specification defines and describes the nature and levels of work performed in the Customer Service Representative job series.

Customer Service Representative I is the entry-level in the Customer Service Representative series. At this level, incumbents learn and perform a limited range of the less complex or specialized work tasks, under closer supervision, with less latitude for independent action.

Customer Service Representative II is the experienced journey-level in the Customer Service Representative series. At this level, incumbents perform the full range of tasks common to the classification series under less supervision while exercising discretion and independent judgment within established guidelines.

SUPERVISION RECEIVED AND EXERCISED

Direct supervision is received from the Customer Service Supervisor and/or Customer Service Manager.

Technical or functional work direction is provided to Customer Service Representative I/II by the Lead Customer Service Representative.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS

Essential and other important responsibilities and duties may include, but are not limited to, the following:

Essential Functions:

1. Responds to customer requests in person or by telephone, mail, or email to initiate, add or terminate residential or commercial water service accounts; explains billing practices and rates; process turn-on and turn-off requests; and field work orders.
2. Maintains records of past due customer accounts; prepares delinquent bill reminders and past due notices; sets date for service shut-off for non-payment; processes NSF checks and refers delinquent accounts to the collection agency in accordance with established District policy; reverse late fees and delinquent processing charges within authority levels, when warranted by the circumstances.
3. Generates service orders for Field Service Technicians and makes a record of fieldwork completed.

Customer Service Representative I/II

Essential Functions (continued)

4. Prepares and posts account, service, comment and payment data to customer records by computer; process credit card payment requests; enter billing and process consumption data for the daily duties; reviews preliminary billing ledger reports before finalizing bills; performs nightly computer update.
5. Perform a wide variety of administrative tasks, including letter generation, memos, data entry, maintaining files, and sorting mail.
6. Cross trains to assist in billing and back-up other department staff as needed.
7. Direct calls to District staff; answers a broad range of general information questions about District programs and procedures. Assist visitors with the automated check-in process and authorize vendor access to the District campus.
8. Assist customers in registering and navigating the online payment portal, including assistance in autopay activation, paperless billing, budget bill, recurring payments, payment by text, and statement retrievable.
9. Assist customers in registering and navigating the online customer usage portal, including interpreting, analyzing, and educating customers regarding automated meter usage.
10. Regular attendance at the worksite.

Marginal Functions:

1. Opens and closes the Administration buildings and turns the alarm system on and off.
2. Performs related duties and responsibilities as required.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

Modern principles and practices of providing good customer service.
Office procedures and methods.
Cash handling techniques.
Record-keeping procedures.
Basic accounting and mathematics.
Strategies for dealing with delinquent accounts.

Skill in:

Operating a personal computer and related software, including basic level Microsoft, Word, Excel, MDM and other related databases.
Uploading and downloading information into a hand-held meter-reading device.

Ability to:

Provide tactful and courteous service to the public.
Resolve complaints calmly and effectively.
Perform mathematical calculations accurately and quickly.
Respond to requests for information from the public and other departments accurately and timely.

Customer Service Representative I/II

Ability to (continued)

Explain District policies and procedures to customers.
Understand and carry out oral and written instructions.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain cooperative working relationships with those contacted in the course of work.
Maintain physical condition appropriate to the performance of assigned duties and responsibilities.
Maintain mental capacity, which allows the capability to make sound decisions and demonstrating intellectual capabilities.
Maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading, writing, and operating assigned equipment.

REQUIRED QUALIFICATIONS

Experience and Training Guidelines

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Customer Service Representative I

Experience:

One (1) year of customer service work in billing, cashiering or establishing and maintaining records of customer accounts with a public utility or equivalent.

Education/Training:

Equivalent to the completion of the twelfth (12th) grade.

License:

Possession of a valid Class C California driver's license and a satisfactory driving record.

Customer Service Representative II

Experience:

Three (3) years of customer service work in billing, cashiering or establishing and maintaining records of customer accounts with a public utility or equivalent.

Education/Training:

Equivalent to the completion of the twelfth (12th) grade.

License:

Possession of a valid Class C California driver's license and a satisfactory driving record.

PHYSICAL DEMANDS AND WORKING CONDITIONS

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment:

Standard office setting; involving public counter and high telephone volume.

Customer Service Representative I/II

Physical Demands and Working Conditions (continued)

Physical:

Incumbents require sufficient mobility to work in an office setting; stand and sit for prolonged periods of time; operate office equipment including computer keyboard; light lifting and carrying; ability to verbally communicate to exchange information; use of hands repetitively to operate finger, handle or feel office equipment and reach with hands and arms. Employees are frequently required to stand and walk.

Mental Demands:

While performing the duties of this class, an employee is regularly required to use written and oral communication skills, read and interpret complex data and information; use math and mathematical reasoning; analyze and solve problems; observe and interpret people and situations; learn and apply new information; perform highly detailed work on multiple, concurrent tasks; work with constant interruptions; interact with District managers and staff, customers who are often upset and dissatisfied, and the public.

Vision:

See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate assigned equipment.

Hearing:

Hear in normal audio range with or without correction.

JOB STATUS:	Non-Exempt
DATE ADOPTED:	October 2001
MODIFIED:	May 2022

Safety Sensitive Position