

DRAFT
CUSTOMER SERVICE REPRESENTATIVE I/II

DEFINITION

Under general supervision, performs a variety of office support duties related to the establishment and maintenance of customer accounts for water and wastewater services; provides direct customer service associated with utility payments, requests for service, responding to complaints and providing information; performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

General supervision is given by the Customer Service Supervisor. No direct supervision of staff is exercised.

CLASS CHARACTERISTICS

Customer Service Representative I

This is the entry-level class within the Customer Service series. Initially, incumbents with experience learn the District's customer service and billing systems, operations, practices, and procedures. As experience is gained, assignments become more varied and are performed with greater independence. Assignments may vary with skill and training of the incumbent. This class is flexibly staffed with the Customer Service Representative II and incumbents may advance to the higher-level class after demonstrating the ability to perform the work of the higher-level class. Advancement from the Customer Service Representative I level to the Customer Service Representative II level is in accordance with District policies and procedures, including receiving the recommendation for advancement from the respective Department Manager or designee.

Customer Service Representative II

This is the journey-level classification within the Customer Service series. This class is distinguished from the Customer Service Representative I by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and may provide team leadership, training and work review for those at the entry-level. Positions may be filled by advancement from the Customer Service Representative I level upon fulfilling the required criteria or by recruiting an outside candidate with substantial administrative or clerical experience in public contact. Incumbents are expected to perform a wide variety of customer service duties with only occasional instruction or assistance. Adequate performance at this level requires the knowledge of departmental office procedures, precedents and the ability to choose among alternatives in solving many problems. A Customer Service Representative II is expected to work productively in the absence of a supervisor. Work is normally reviewed upon completion and for overall results. This class is distinguished from the Customer Service Supervisor in that the latter has overall responsibility for the Customer Service Department.

EXAMPLES OF DUTIES (Illustrative Only)

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to assist individuals with disabilities to perform the essential functions.

Customer Service Representative I

Knowledge of:

- Standard office procedures, practices, and equipment
- Basic cash handling practices and recordkeeping
- Business arithmetic and statistical techniques
- Computer applications related to the work, including word processing spreadsheets and database applications and data entry
- Basic filing systems
- Receptionist duties, receive calls and visitors and direct them to appropriate person or department

Skills:

- Provide information and answer questions calmly in stressful situations
- Respond to and effectively prioritize multiple phone calls and other requests or interruptions
- Interpret, apply and explain policies and procedures
- Compose correspondence independently or from brief instructions
- Balance cash receipts
- Organize own work, set priorities and meet critical time deadlines
- Respond to customer inquiries and complaints in person or by telephone, provide information and solutions of billing issues, make billing arrangements, and represent the District in a professional and courteous manner

Abilities:

- Make accurate arithmetic, financial and statistical computations
- Receive customer payments in person or by mail; make change, issue receipts, balance cash, prepare deposit documents and end-of-day reports
- Use English effectively to communicate in person, over the telephone and in writing
- Exercise independent judgment and utilize initiative within established procedural guidelines
- Accuracy in establishing, maintaining and researching files
- Organizing own work, setting priorities and meeting critical time deadlines
- Providing information and answering questions calmly in stressful situations
- Establish and maintain effective working relationships and act in a courteous manner when interacting with the public, vendors, contractors and District staff in person and over the telephone
- Understand and follow written and oral instructions
- Communicate information and policies clearly and concisely, both verbally and in writing

Customer Service Representative II

All knowledge, skills and abilities as that of the Customer Service Representative I required including:

- Operate computer billing system, process field meter readings, identify abnormal readings; prepare, audit, review and send bills;
- Set up new accounts and prepare closing bills for canceled service
- Verify water and wastewater service locations for new customers by reading as-built engineering maps; research pressure readings, hydrant locations and main line locations
- Prepare First Past Due Notices, Second Past Due Notices with late charges and 24-hour Shut Off Notices
- Track and send first and second collection letters; telephone customers with past due accounts; refer delinquent accounts to collection agency
- Work closely with the Operations & Maintenance staff to maintain location of backflow devices; establish service for newly installed meters including new construction

Education and Experience:

To qualify, a successful incumbent must possess both education and experience, which would provide the required knowledge and abilities. Experience may substitute for education. Minimum requirements to obtain the requisite knowledge and abilities are:

Education and Experience:

Customer Service Representative I

Equivalent to high school graduate with one (1) year of experience in providing general office support, computer applications such as word processing and spreadsheets. Some customer service experience highly desirable.

Customer Service Representative II

Equivalent to high school graduate supplemented by business school or college level coursework in business and computer applications with two (2) years of administrative/clerical experience in an office environment and intermediate Microsoft Office skills. Prior customer service experience required.

Licenses or Certifications:

Possession of a valid California Class C Driver's License and the ability to be insured for the operation of a District vehicle in accordance with the terms and conditions of the District's insurance program.

Physical Demands:

Must possess mobility to work in a standard office setting including standing, walking, sitting, kneeling, stooping, reaching overhead and below waist level. Use of standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, over the telephone.