



SENIOR CUSTOMER SERVICE REPRESENTATIVE

DEFINITION

Under direction, performs a variety of advanced level and/or lead customer service support by telephone in person; performs customer billing and account maintenance as a primary function; performs highly responsible office administrative duties activities; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management personnel. Exercises technical and functional direction over and provides training to less experienced staff.

CLASS CHARACTERISTICS

This is the advanced journey-level classification in the Customer Service Representative series responsible for performing the most complex work assigned to the series. Incumbents regularly work on tasks which are varied and complex, requiring considerable discretion and independent judgement. Positions in the classification rely on experience and judgment to perform assigned duties. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timeframes, and methods to complete assignments. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy requirements.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations where appropriate so qualified employees can perform the essential functions of the job.

- Responds to customer requests in person or by telephone, mail, fax, or computer, to add or terminate residential or commercial water service accounts; explains billing practices and rates; processes turn-on and turn-off requests, researches account requests, re-reads, and other field work orders; uses text, phone system, and, in emergencies, radio communications, to contact employees in the field.
- Responds to customer inquiries and complaints regarding District services referred by staff for difficult or complex cases; routinely handles a variety of problems related to concerns with the accuracy of meter readings, high consumption, delinquent accounts, non-reads, and improper billings; provides information on cost for various types of service installations; processes new services/tracts; performs a variety of functions in receiving and processing service requests; applies District policies and regulations regarding establishment and maintenance of services.
- Serves in a lead role in the Customer Service Division and leads and trains subordinate staff.
- Serves as District receptionist and receives centralized phone calls; provides a variety of information to customers and the public related to District services and activities; refers callers to appropriate individual or department as required.
- Receives and processes billing payments; receives monies from the public; endorses checks; makes change; records receipt of payments; counts cash; performs fiscal recordkeeping work.
- 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; processes delinquent

closed accounts and liens in accordance with established District policy; reverses late fees and delinquent processing charges within authority levels when warranted by the circumstances.

- Prepares and posts account, service, comment, and payment data to customer records by computer; processes credit card payment requests; assists in generating and preparing billing statements; reviews preliminary billing ledger reports prior to processing bills; performs nightly update.
- Interprets customer accounts by using knowledge of applicable District rules; assists customers in resolving account related problems with discretion and within policy guidelines; analyzes customer credit history and determines approval of extensions and waiver of deposits; analyzes customer credit history and determines approval of extensions and waiver of deposits.
- Participates in cross training and provides back up to other department staff; assists other office personnel in performing related administrative support functions; serves as a back-up to accounts payable and payroll functions; assists with processing sewer applications and accepts plans and payments.
- Notarizes documents for lien properties due to non-payment, releases liens.
- Performs a variety of administrative and office support functions in support of departmental or divisional operations.
- Uses word processing software to produce various documents from drafts, notes, dictation, or brief instructions, which may include memos, correspondence, reports, records, forms, notices, meeting agendas and minutes, composes routine correspondence and other documents as required.
- Establishes and maintains office files; researches and compiles information from such files.
- Maintains official District records; enters and retrieves computer data; generates routine computer reports and spreadsheets.
- Provides information and assistance to District staff and the public, requiring the understanding of policies, procedures, or rules.
- Attends various meetings and training as required or appropriate.
- Ensures staff observe and comply with all District and mandated safety rules, regulations, and protocols.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Programs, goals, policies, and procedures of the assigned department or division.
- Advanced customer service and customer relations practices and principles.
- Advanced principles, methods, and practices of financial and customer account recordkeeping work.
- Daily cashiering procedures and duties.
- District policies, rules, procedures, and regulations involved in the establishment of customer accounts, customer billing, and account collections.
- Customer service and billing account management system software and procedures at an advanced level.
- Water and sewer related services.
- Methods of preparing and processing various records, reports, forms, and other documents particular to assigned department or program.

- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Standard office management and secretarial/clerical practices and procedures.
- Recordkeeping principles and procedures.
- Business arithmetic, including percentages and decimals.
- District and mandated safety rules, regulations, and protocols.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Instruct and train others in District customer service policies and procedures and equipment.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Prepare complex reports and keep detailed records; examine source documents and review for accuracy and discrepancies.
- Provide excellent customer service; effectively resolve difficult public concerns and difficult customer complaints; provide effective resolutions within established guidelines.
- Compose correspondence and reports independently or from brief instructions; maintain records and databases.
- Understand and explain department policies, procedures, and standards.
- Interpret customer accounts and consumption records; maintain a variety of financial and statistical records related to customer service.
- Train others in District customer service policies, procedures and equipment.
- Word process accurately at speeds necessary for successful job performance.
- File materials alphabetically, chronologically, and numerically.
- Gather and compile department/division-specific information from a variety of sources.
- Perform detailed, complex, and accurate arithmetic computations quickly and accurately.
- Establish and maintain a variety of filing, recordkeeping, and tracking systems.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Use tact, initiative, prudence, and independent judgment within general policy and procedural guidelines.
- Independently organize work, set priorities, meet critical time deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

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

Education:

- Possession of a high school diploma or G.E.D. required, supplemented by college level coursework in accounting, bookkeeping, or a related field.

Experience:

- Five (5) years of experience in all aspects of customer service accounts management and billing work.

Licenses and Certifications:

- Possession of, or successful acquisition within 12 months of employment, a valid certification as a Notary Public of the State of California, to be maintained throughout employment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.