



CUSTOMER SERVICE REPRESENTATIVE I/II

DEFINITION

Under immediate (Customer Service Representative I) or general (Customer Service Representative II) supervision, performs a variety of routine to moderately complex and responsible customer service support duties by telephone and in person; assists in performing tasks associated with customer billing, account maintenance, and office administrative activities; provides information and assistance to the public and District staff; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate (Customer Service Representative I) to general (Customer Service Representative II) supervision from assigned supervisory or management staff. Exercises no direct supervision over staff. Customer Service Representative II's may assist in the training of Customer Service Representative I's.

CLASS CHARACTERISTICS

Customer Service Representative I: This is the entry-level classification in the Customer Service Representative series. Initially under close supervision, incumbents learn and perform entry level customer service-related work involving customer contact by telephone and in person and perform routine office administrative duties. As experience is gained, assignments become more varied, complex, and/or difficult; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the Customer Service Representative II level but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

Customer Service Representative II: This is the fully qualified journey-level classification in the Customer Service Representative series. Positions at this level are distinguished from the Customer Service Representative I level by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative; incumbents cross train and provide back up to other staff including accounts payable and payroll functions. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

Positions in the Customer Service Representative class series are flexibly staffed; positions at the Customer Service Representative II level are normally filled by advancement from the Customer Service Representative I level; progression to the Customer Service Representative II level is dependent on (i) management affirmation that the position is performing the full range of duties assigned to the classification; (ii) satisfactory work performance; (iii) the incumbent meeting the minimum qualifications for the classification including any licenses and certifications; and (iv) management approval for progression to the Customer Service Representative II level.

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.

Positions at the Customer Service Representative I level may perform some of these duties and responsibilities in a learning capacity.

- Serves as District receptionist and receives centralized phone calls; provides a variety of information to customers and the general public related to District services and activities; refers callers to appropriate individuals or departments as required; takes messages as necessary; receives visitors and provides a variety of routine information; may use radio equipment to communicate with field personnel.
- 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.
- Responds to customer inquiries and complaints regarding District services; 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 costs for various types of service installations; processes new services and tracts; performs a variety of functions in receiving and processing service requests; applies District policies and regulations regarding establishment and maintenance of services.
- 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 dates 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.
- 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.
- Participates in cross training and provides back up to other department staff including accounts payable and payroll functions; assists other office personnel in performing related administrative support functions.
- Notarizes documents for lien properties due to non-payment; releases liens; processes demands from escrow companies.
- Prepares and posts account, service, comments, and payment data to customer records by computer; processes credit card payment requests; assists in generating and preparing billing statements for mailing; reviews preliminary billing ledger reports prior to processing bills; performs nightly update.
- Performs a variety of administrative and office support functions in support of departmental or divisional operations; copies documents; creates file folders, files documents, and retrieves files; processes mail; collates documents; maintains records, lists, and logs; scans, images, and indexes documents; orders and maintains inventory of supplies and forms.
- Assists in assembling information from a variety of sources for the completion of forms, records, work orders, permits, and other documents; contacts individuals to obtain additional information as needed.
- 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, research and compiles information from such files.
- Enters and retrieves computer data; generates routine computer reports and spreadsheets.

- Attends various meetings and training as required or appropriate.
- Observes and complies 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.
- 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.
- 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:

- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Prepare reports and keep detailed records; examine source documents and review for accuracy and discrepancies.
- Provide excellent customer service; effectively resolve 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.
- Type and/or word process accurately at a speed necessary for successful job performance.
- File materials alphabetically, chronologically, and numerically.
- Gather and compile department and division-specific information from a variety of sources.
- Perform accurate arithmetic computations.
- 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 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.

Customer Service Representative II

- Train others in District customer service policies, procedures, and equipment, as assigned.

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.

Experience:

- Customer Service Representative I: One (1) year of customer service work involving public contact, in person or over the telephone,
- Customer Service Representative II: Three (3) years of experience in customer service work involving public contact, in person or over the telephone, as well as experience in utilities, billing, accounting, or bookkeeping. Three (3) years of increasingly responsible experience at a level equivalent to Customer Service Representative I with Mission Springs Water District is qualifying.

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.