

CUSTOMER SERVICE REPRESENTATIVE III

DEFINITION

Under direction, performs complex and responsible customer service duties in support of the District's billing function including collecting and managing all data related to bill production, meter reading, account creation and closures, meter management, and delinquent customer collection efforts in accordance with District standards, policies and applicable legal requirements; assists in the development and testing of billing system procedures and changes; provides assistance to less experienced Customer Service Representatives as well as members of other departments; serves as back-up for customer service functions; provides a variety of information to other agencies, District staff, and the general public; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management personnel. May exercise technical and functional direction over and provide training to less experienced staff.

CLASS CHARACTERISTICS

This is the advanced journey-level classification in the Customer Service Representative series. Positions at this level are distinguished from the Customer Service Representative II level by working on tasks that are varied and complex, requiring the use of considerable discretion and independent judgment in performing assigned work, or ensuring the efficient and effective functioning of an assigned program or operational area. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products or services. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. The class is further differentiated from the Customer Service Supervisor who is responsible for, planning, organizing, supervising, reviewing, and evaluating the work of assigned staff.

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 so that qualified employees can perform the typical functions of the job.

- Utilizes billing and meter reading systems to generate files used to calculate water usage for billing purposes; reviews file for anomalies and to ensure accuracy; generates service orders for field staff to check meters that are reporting unauthorized or inaccurate usage; reviews finding and general maintenance orders to repair malfunctioning meters.
- Generates accurate monthly customer bills for water and sewer utilizing all processes necessary for accuracy; transmits data file for processing and mailing; produces final bills for closed or due to be closed accounts in accordance with District policies.
- Approves payment files for posting to customer accounts; ensures accuracy of and approves payment batches generated at customer service counter and final approval of payment patches generated through automated check processing; generates and submits customer AutoPay files to bank; prepares monies received for bank deposit.
- Performs connection fees processing; collects payments for new water and sewer connections;

verifies accuracy of forms and documents; prepares necessary paperwork to ensure accurate processing through Finance; communicates requirements to developer/customer and provides direction of actions necessary to install new water and sewer services to appropriate departments; creates new account in billing system and manages the developer file to ensure accurate records for new development.

- Processes uncollected funds and returned payment items; provides customer written notification of returned payment; reviews closed unpaid accounts; generates written warning to customer and/or determines accounts that can be sent to collection and/or a lien.
- Manages delinquent accounts; reviews and applies delinquent fees to customer accounts; creates past due notice and contacts customer; transmits final notice files for processing; selects and verifies accuracy of service orders generated to lock meters due to nonpayment.
- Reviews completion of all work and service orders assigned to Field Services; assists Finance in reconciling billing, payment, and adjustment transactions.
- Interacts courteously with customers; answers questions and resolves customer inquiries; reviews accounts for balance, due dates, and payments received; updates information in accounts as required; handles escalated customer calls and provides solutions for customer billing and payment options, offering solutions consistent with the interest of the District and the customers' ability.
- Provides back up assistance for Customer Service functions including switchboard and reception operations, front counter, mail, and incoming payment processing, balancing of cash drawers, reviewing cash receipts, bank deposits, ordering currency/coins, preparation of credit reports, operating the payment remittance machine and other assigned areas.
- Provides assistance, guidance and training for other less experienced Customer Service Representatives.
- Assists with specials projects and assignments as directed.
- Reads, understands, and ensures compliance with the District's Safety Manual; attends safety meetings as required; reports all accidents, violations, or infractions to supervisor.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Clerical accounting methods, principles, and practices.
- Terminology used in billing and financial recordkeeping work.
- Principles and practices of effective reception and proper telephone etiquette.
- Customer service techniques, practices, and principles.
- Basic mathematical practices.
- Cash handling techniques.
- Principles and practices used to establish and maintain files and information retrieval systems.
- Principles of business letter writing and basic report preparation.
- 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:

- Troubleshoot and provide solutions to a full range of customer account issues.
- Effectively deal with difficult customers with courtesy and tact.
- Provide lead direction and training.
- Understand the organization and operation of the District and of outside agencies.
- Understand, interpret, and apply general and specific administrative and departmental policies and procedures.
- Independently prepare correspondence and memoranda; implement and maintain filing systems.
- Type and enter data at a speed necessary for successful job performance; operate a 10-key calculator by touch; make mathematical computations rapidly and accurately.
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
- Independently organize work, set priorities, meet critical deadlines and follow-up on assignments.
- Use tact, initiative, prudence and independent judgment within general policy and procedural guidelines.
- 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; respond to inquiries tactfully, clearly, concisely, and appropriately.
- 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:

Equivalent to completion of the twelfth (12th) grade supplemented by specialized general office, clerical, clerical accounting coursework or continuing education.

Experience:

- Four (4) years of increasingly responsible customer account management and billing experience.

Licenses and Certifications:

- None

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

ENVIRONMENT

Standard office setting; frequent interaction with District staff and the general public.

PHYSICAL

- Level One

Incumbents require sufficient mobility to work in an office setting; stand or sit for prolonged periods of time; operate office equipment including use of a computer keyboard; light lifting and carrying; ability to verbally communicate to exchange information.

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 the normal audio range with or without correction.