

CUSTOMER SERVICE REPRESENTATIVE I/II

DEFINITION

Under immediate (Customer Service Representative I) to general (Customer Service Representative II) supervision, performs a variety of customer service, account processing, and recordkeeping activities in support of the District's utility billing operations; maintains frequent contact with the public providing support for a variety of billing and utility service inquiries in-person or on the phone; opens, closes, and maintains customer files and accounts; processes payments and logs account activity; performs switchboard and reception support duties; processes various applications, appeals, and variances; processes final bills to closes accounts; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate (Customer Service Representative I) to general (Customer Service Representative II) supervision from assigned supervisory or management personnel. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

Customer Service Representative I: This is the entry-level classification in the Customer Service Representative class series. Initially under close supervision, incumbents learn and perform a wide variety of office support, clerical duties, and activities in support of the District's customer service functions. As experience is gained, assignments become more varied, complex, and 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 class 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. 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. This class is distinguished from the Customer Service Representative III in that the latter provides technical and functional direction to low-level support staff, as assigned, and is responsible for the more complex work.

Positions in the Customer Service I/II class series are flexibly staffed; positions at the II-level are normally filled by advancement from the I-level. Progression to II-level is dependent on satisfactory work performance (an overall performance rating of "exceeds standards" or higher on most recent annual performance evaluation is required), the incumbent meeting the minimum qualifications for the classification, and management approval.

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.

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

- Maintains customer services files and records; accurately enters, maintains, and updates customer account information into the District's computerized system; prepares service orders for new service open/close, meter reads, meter rereads and related matters.
- Accepts payments by phone or in person; accurately enters payments, adjustments, deposits, and address changes to customer accounts; efficiently and accurately handles cash transactions; operates cash register system; verifies accuracy of payments to accounts and balances cash drawers as directed; accesses department safe and transfer daily cash/check deposits to armed security.
- Sets up accounts for automatic deductions; researches and corrects returned payments; balances payments not entered in remittance machine and prepares them for computer entry.
- Interacts courteously with customers; answers general customer questions consistent with District policies and procedures; resolves customer billing issues in person, on the telephone or by written correspondence; follows up with customers regarding accounts; provides customer receipts.
- Mails forms and letters; replies to customer emails and maintains the customer service inbox; arranges new service set up and enters new meters into the system; processes hydrant meter applications; navigates GIS and accesses county records for owner verifications; collects fees for new meter and sewer connections; sets up construction accounts with hydrant meters.
- Monitors and closes unpaid accounts; processes delinquent turn-offs on accounts with past due bills; applies re-connect charges as required.
- Processes and generates final closing bills on closed accounts; applies adjustments to accounts; provides refunds to customers as necessary; processes reports to finance.
- Processes rate assistance applications, leak appeals and budget variances; prepares, prints, and files various listings and reports; monitors, maintains, and orders supplies for the section; maintains supply of forms, applications, door hangers and perforated paper.
- Performs switchboard operations and reception duties; receives and routes incoming telephone calls to appropriate departments; signs in and directs visitors; answers questions and provides information to callers and visitors.
- Assists with special projects and assignments as requested.
- 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

Positions at the Customer Service Representative I level may exercise some of these knowledge and abilities statements in a learning capacity.

Knowledge of:

- Basic clerical accounting methods, principles, and practices.
- Terminology used in billing and financial recordkeeping work.
- Principles and practices of effective reception and telephone techniques including 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:

- Learn the organization, operation, and services of the District and of outside agencies as necessary to assume assigned responsibilities.
- Learn the programs related to service fees, billing, and account maintenance; explain information about water budgets, rates, high usage and how those affect billing.
- Effectively deal with difficult customers with courtesy and tact.
- Learn, interpret, and apply general administrative and departmental policies and procedures.
- 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 customer and public contact by phone and in person.
- Set up and maintain a variety of files and records.
- 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.
- 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.

Experience:

Customer Service Representative I:

- One (1) year of responsible clerical support experience involving a high level of public contact.

Customer Service Representative II:

- Three (3) years of increasingly responsible customer service and clerical support experience, including experience using a computerized account billing system.

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.