

	Job Classification:	Customer Service Representative I / II / III / Senior
	Representation:	SEIU Local 1021
	FLSA:	Non-exempt
	Effective Date:	October 16, 2015
	Revision Date:	

Classification specifications, i.e. job descriptions, are intended to present a descriptive summary of the range of duties and responsibilities performed by an incumbent in the classification. Furthermore, specifications are intended to outline the minimum qualification for entry into the classification and are not intended to reflect all duties and responsibilities of an incumbent in the classification.

Summary/distinguishing characteristics

Positions in this classification perform a variety of functions in conducting administrative and technical duties related to customer service in accordance with District policies and procedures related to water and wastewater services and will be responsible for answering customer inquiries, payment procedures, maintenance of customer account records, clerical tasks and other duties as assigned.

Customer Service Representative I – Is the entry level class in the series. Under close supervision, an incumbent in this position will perform a variety of customer service duties. The Customer Service Representative I level is distinguished from the Customer Service Representative II level by the performance of less than the full range of duties assigned to the Customer Service Representative II level. This includes answering customer inquiries, payment procedures, maintenance of customer account records, clerical tasks, etc.

Customer Service Representative II – Is a mid-level class in the series and is distinguished from the Customer Service Representative I level by the assignment of additional duties. Employees at this level are more familiar of the operating procedures and policies within the work unit. This class is distinguished from the Customer Service Representative III in that the latter performs the increasingly difficult and complex duties assigned to the classes within this series.

Customer Service Representative III – Is a mid-level class in the series and is distinguished from the Customer Service Representative II level by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit. This class is distinguished from the Customer Service Representative Senior in that the latter provides general, technical, and functional supervision to incumbents in other classes.

Customer Service Representative Senior – Is the journey level class in the series and is only available upon promotional opportunities. Under general supervision, an incumbent in this position will perform the full range of assigned duties which includes more difficult and complex assignments and technical and functional supervision to incumbents in class levels I, II, and III. This class is distinguished from the Public Information Officer/Customer Relations Manager position, which is the management level class providing supervision and direction for the Customer Service Department.

Supervision received

Customer Service Representative I, II and III – Receives technical, functional, and general supervision and direction from the Customer Service Representative Senior and/or Public Information Officer/Customer Relations Manager.

Customer Service Representative Senior – Receives general and immediate supervision and direction from the Public Information Officer/Customer Relations Manager.

Essential duties

The following duties are typical for this position. Depending upon the assignment, the employee may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address District needs and changing business practices. The omission of specific statements of duties does not exclude the position if the work is similar, related or a logical assignment to the class.

Customer Service Representative I

- Conduct daily opening and closing office procedures.
- Greet customers and visitors at the front desk in a pleasant and courteous manner and provide whatever assistance they may need.
- Respond to phone calls, messages, faxes and emails.
- Answer main phone line and radio calls; provide assistance, route calls, or take messages for internal and external customers.
- Serve as cashier; using utility billing software, receive and post all forms of payments received via mail, drop box, phone, in person, or in electronic form.
- Apply and communicate routine/basic information on District policies and regulations regarding water/wastewater service, billing, and meters to customers in a courteous and friendly manner, or refer to the proper person.
- Check customer service email address inbox and customer service voicemail frequently and distribute or respond as appropriate.
- Sort, open, and process customer service mail.
- Monitor, date stamp, and distribute incoming faxes.
- Create, track, and process Utility Service Requests (USRs).
- Prepare and send work orders.
- Process customer address updates.
- File and maintain all customer service files, both hard copy and digital.
- Assist other customer service representatives with tasks as required, including the preparation of form letters, lock-off letters, returned mail, etc.
- Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
- Perform related duties as assigned.

Customer Service Representative II – In addition to the essential duties described above, a Customer Service Representative II is additionally responsible to:

- Assist in expediting resolution of customer complaints.
- Maintain customer accounts; includes processing account and leak adjustments, payments, Auto ACH, refunds, return payment items, change in services, secondary bill-to, final bills, lock-offs, restoration of service, collections, general account clean-up, etc.
- Process standard new connections.
- Open and close batches.
- Audit meter routes.
- Process and track water conservation rebates and free supplies.
- Track and close work orders.
- Reconcile cash drawer on a daily basis at close of business.
- Prepare a variety of letters; account demands, credit references, account updates, possible leaks, etc.

Customer Service Representative III – In addition to the essential duties described above for levels I and II, a Customer Service Representative III is additionally responsible to:

- Maintain information used by the Customer Service Department and internal employees, including grease trap list, new connection report, consumption log, fees in Springbrook, etc.
- Track and process property sales (IRIS), foreclosures, and bankruptcies through electronic programs; prepare letters, adjustments, etc. to update District customer accounts.
- Process tax roll and special billings/credits, including calculations, letters, adjustments, etc.
- Process suspensions of service, demands, and lead/copper credits.
- Take lead responsibility on lock-off day, including the management of the lock-off list.
- Review monthly reminder, door tag, and lock-off lists prior to final processing.
- Generate and audit various reports, letters, etc. as requested.
- Process new commercial connections and line extensions, including the set up and tracking of inspections.
- Handle special, unique, and difficult situations, with the assistance of the Public Information Officer/Customer Relations Manager.
- Provide backup to the Finance Department for all billing functions, including generating bills, reminder notices, and door tags in emergency and extenuating circumstances.
- Assist Public Information Officer/Customer Relations Manager with special projects and in revising policies and procedures.

Customer Service Representative Senior – In addition to the essential duties described above for levels I, II, III, a Customer Service Representative Senior is additionally responsible to:

- Technical, functional, and general supervision and direction of incumbents in class levels I, II and III.

Qualifications

Any combination of training and experience that would provide the required knowledge, skills and abilities is qualifying.

Knowledge of:

- Principles and practices of efficient and effective customer service via face-to-face, over-the-phone, and electronic means.
- Customer account maintenance; use of electronic customer database, payment and billing systems.
- Records management principles and practices.
- Business arithmetic.
- Standard business practices such as letter writing, report writing, preparing informational materials in visual formats using Microsoft Office software programs.
- English language usage, spelling, grammar, and punctuation.

Ability to:

- Respond to and effectively prioritize multiple phone calls and other request or interruptions.
- Communicate clearly and concisely both orally and in writing with District staff, co-workers, consultants and the public.
- Learn, interpret, and apply applicable policies, procedures, laws, codes, and regulations pertaining to the District.
- Efficiently use computer and financial database programs with sufficient speed and accuracy to perform assigned work; intermediate to advanced skills in Microsoft Office programs.
- Perform a variety of independent research, information retrieval, analysis and report preparations to draw logical conclusions.
- Professionally and tactfully provide customer service to the public and co-workers in person, over the phone or through electronic means.
- Efficiently evaluate and respond appropriately to customer complaints.
- Handle stressful situations and difficult customers in a calm and professional manner.
- Plan, coordinate, prioritize and organize multiple work tasks to meet deadlines with accuracy, thoroughness, and attention to detail, sometimes with little supervision.
- Read, understand and carry out written and oral directions in a clear, concise, and consistent manner.
- Use initiative and independent judgment within established procedural guidelines.
- Use arithmetic to make basic financial calculations quickly and accurately.
- Operate a variety of automated office machines typical of a work environment such as a multi-function printer/copier/scanner machine, fax machine, envelope opener, postage machine, laminator, etc.
- Establish and maintain an effective and cooperative working relationship with coworkers through knowledge of work, personal and professional conduct, teamwork, and good judgment.

Minimum education and experience: Any combination of education and experience which would likely provide the necessary knowledge and abilities is qualifying:

Customer Service Representative I –

- Graduation from high school or equivalent.
- Two years of increasingly responsible clerical/customer service experience, preferably in the public utility industry.

Customer Service Representative II –

- Graduation from high school or the equivalent.
- Four years of increasingly responsible clerical/customer service experience, preferably in the public utility industry, or two years of experience serving at the District Customer Service Representative I level.

Customer Service Representative III –

- Graduation from high school or the equivalent.
- An Associate's Degree from an accredited college or university with major coursework in business administration or a related field is preferable.
- Six years of increasingly responsible clerical/customer service experience, preferably in the public utility industry, or three years of experience serving at the District Customer Service Representative II level.

Customer Service Representative Senior –

- Graduation from high school or equivalent.
- An Associate's Degree from an accredited college or university with major coursework in business administration or a related field is preferable.
- Eight years of increasingly responsible clerical/customer service experience, preferably in the public utility industry, or four years of experience serving at the District Customer Service Representative III level.

Licenses and/or certifications:

- Valid California driver's license issued by the California Department of Motor Vehicles and safe driving record.
- Eligible to work in the United States.

Physical requirements

While performing the duties of this job, the employee is regularly required to sit at a desk and in meetings for long periods of time on a continuous basis; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation with fingers; reach with hands and arms; use a telephone or other electronic communication devices; stand for long periods of times at counter, copy or fax machines; communicate orally and through written means; use standard office equipment such as computers, copiers, and fax machines; write or use a keyboard to perform assigned duties; bend, squat, climb, kneel and twist while checking equipment; occasionally stand and/or walk over both even and uneven ground;

occasionally climb stairs, stoop, kneel, crouch, or walk and/or stand on slippery surfaces; occasionally lift and/or move up to 25 pounds; hearing and vision within normal ranges with or without correction.

Work environment

Work is generally carried out in a typical office setting. While performing the duties of this job, the working conditions are those of a typical office environment, with temperatures occasionally too warm or too cold, moderate noise levels and under lighting conditions typical of an office. Travel may be necessary on an occasional basis via District vehicle (or may request to use personal vehicle) for District-related duties and activities.