

## CUSTOMER SERVICE REPRESENTATIVE I/II

### JOB SUMMARY

Under supervision, performs a wide variety of routine to complex customer service functions: provides information; looks up account information; posts payments; researches problems; performs collection and credit arrangements, by telephone and in person; and performs related duties as required.

As the Representative I incumbent gains skills and performs more difficult work through experience and training, and as a desired level of proficiency is reached, advancement to Customer Service Representative II class can be reasonably expected. Most incumbents gain the skill, experience, certification and proficiency for advancement within two years with the District.

### EXAMPLES OF DUTIES

*(Duties include but are not limited to the following):*

- Responds to customer requests in person, by telephone, mail, and fax, and initiates the addition or termination of residential, commercial, and agricultural water service accounts; explains billing practices and rates; processes service turn-on and turn-off field work orders; records information in customer account records.
- Obtains and enters required account data into computer terminal, including, names, addresses, account numbers, meter numbers, deposits, meter readings and payments received.
- Answers correspondence and conducts research to answer customer inquiries.
- Establishes deposits from written guidelines for new utility accounts; opens or reopens accounts which have been previously locked due to returned checks or for non-payment.
- Prepares annual collection reports of in-house collections and write-offs.
- Maintains records for annual collection of qualified accounts on property tax bills.
- Prepares and/or processes a variety of documentation such as notifications, liens, bankruptcy and foreclosure notices on uncollectible accounts.
- Makes determinations of accounts to be shut-off for nonpayment or undocumented customer service information, and processes shut-off lock list.
- Determines whether credit arrangements have been made or other changes in account status have occurred.
- Posts deposit information, daily payments, closing accounts and monthly water billing statements.
- Makes collection calls and prepares delinquent letters to customers with final billings; notifies owners of their responsibilities regarding tenants' billings.
- Accesses computer records for account balances and account numbers on checks; verifies date and signature of checks; returns improperly completed checks; batches and totals payment stubs.

- Refers customers who are irate or who have complex, specialized or unusually sensitive account or credit situations to the accounting supervisor or department manager.
- Operates calculator, typewriter, letter opener, photocopier, mail inserter machine, scanner and related equipment.
- Makes courtesy calls to customers on unpaid open accounts and advises of pending disconnections of service.
- Calls field staff for rereads and contacts customer with information.
- Types correspondence, envelopes, lists, authorization cards and related materials.
- Performs other related duties as assigned.

## **EMPLOYMENT STANDARDS**

### Knowledge of:

- Customer service practices and customer-oriented telephone etiquette.
- Modern office equipment and procedures.
- English usage, spelling, grammar, and punctuation.
- General work processing methods.
- Basic arithmetic.
- Simple record keeping methods.

### Ability to:

- Handle tactfully and effectively sensitive customer relations situations and defuse situations that are highly emotional and volatile.
- Quickly, efficiently and calmly handle a high volume of customer interactions by telephone and in person.
- Learn to maintain and update payment and billing records.
- Learn to resolve problems regarding delinquent accounts.
- Learn the policies and procedures for billing, collections and credit.
- Learn the characteristics of the District's customer base, including typical causes for high consumption.
- Learn to interpret, explain and apply complex District rules regarding water, sewer and fire service rates and policies.
- Learn to use computerized billing and customer information systems and software.
- Reach sound decisions in accordance with rules and policies.
- Perform routine clerical work.
- Operate a keyboard and 10-key with efficiency and accuracy.
- Use tact, discretion, patience and understanding in dealing with customers and the public.
- Maintain sensitive and confidential information.
- Understand and carry out oral and written directions.
- Establish and maintain effective relationships with those contacted in the course of work.

### Experience and Education:

Any combination of training, experience and education that could likely provide the required knowledge and abilities stated above, and the ability to perform the duties of the position would be qualifying. A typical way to obtain the knowledge and abilities would be:

Experience: One to two years of customer service and clerical experience is required. Experience in customer service functions in a government or public utility setting is highly desirable.

Education: Formal or informal education or training at a level which ensures the ability to read, write, and perform mathematical computations and write reports at a level necessary for successful job performance.

Licenses and Certificates:

Possession of a valid California driver's license, Class C, with ability to maintain insurability under the District's insurance carrier.

Physical Demands:

Hear normal conversation in person and/or on the telephone, with or without electronic aids; see to read fine print; sit or stand for prolonged periods of time; use hands and fingers repetitively to manipulate small objects and print or write legibly; frequently lift up to 25 pounds; reach with hands and arms; speak in a normal voice to be able to be heard and understood on the telephone and awareness of electrical hazards.

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