

CUSTOMER SERVICE REPRESENTATIVE I/II

DEFINITION

Under the general supervision of the Director of Finance & Business Services, performs a wide variety of clerical and accounting tasks related to customer service and business needs; including establishing and closing accounts, processing billing, resolving customer inquiries and problems and other duties pertaining to the business.

CLASS CHARACTERISTICS

Customer Service Representative (CSR) I/II are expected to set up accounts, issue bills, receive and process payments, handle customer inquiries and complaints, write service/work orders and perform basic clerical tasks in support of the customer service function. Incumbents may perform clerical accounting tasks such as cash reconciliations, inventory and purchase orders. Incumbents may train other staff and may be cross-trained in several areas, including accounting duties.

CSR II is distinguished as being fully competent in CSR I duties, including interpreting and explaining District Policies and Procedures, dealing with difficult customer inquiries and problems, and periodic accounting and reporting tasks. An incumbent at the CSR II level may also provide guidance and assistance to employees at the CSR I level, as needed. CSR II may act as supervisor in the Director of Finance & Business Services absence.

CLASS INFORMATION, SUPERVISION RECEIVED AND EXERCISED

Supervised by:	Director of Finance & Business Services
Lead direction over:	CSR II may exercise lead direction to CSR I
MOU : Classified; non-exempt	Pay: CSR II has 5% pay differential

ESSENTIAL DUTIES (Duties may include, but are not limited to, the following):

Assists customers requesting to establish and/or terminate water service; accepts and receipts payments; makes arrangements for customer meters to be re-read and to check for leaks; modifies payment schedules upon request; follows up on customer complaints and notifies appropriate staff for assistance.

Answers phones and takes messages; responds to customer requests for information and forms; explains District policies and procedures; sorts and distributes incoming and outgoing mail; orders and maintains needed supplies.

Downloads meter usage data; generates and mails utility billing statements; issues late notices and disconnect notices; maintains records of customer accounts.

Performs complex reconciliations, including cash, utility and accounting reconciliations; prepares bank deposits; counts cash receipts and posts receipts. Place, receive and monitor inventory and purchase orders.

Types correspondence, memoranda, and warrant lists, and composes routine letters and correspondence; prepares and issues purchase orders for material, supplies, equipment and services.

Maintains customer accounts and related accounting documents; enters adjustments according to well established procedures and guidelines, prepares reports and locates discrepancies.

Uses two-way radio to communicate with field personnel concerning emergency water shut-offs; notifies appropriate outside agencies and customers of water shut-offs by phone or mail; prepares internal communications detailing events and routes to appropriate staff.

QUALIFICATIONS

DEMONSTRATED KNOWLEDGE OF AND PERFORMANCE IN THE FOLLOWING AREAS:

- Principles and practices of business and basic accounting;
- Use of computers and software in the development of accounting records and financial reports;
- Principles and techniques of customer service;
- General office procedures;
- Basic mathematics including addition, subtraction, multiplication and division;
- Principles and practices of written communication, English grammar, punctuation and writing.

ABILITY TO:

- Communicate effectively, both orally and in writing with customers over the counter and on the phone, deal with hostile or upset people;
- Perform basic mathematical computations, sufficient to calculate bills and maintain accounting records;
- Read, interpret and apply policies and procedures;
- Ability to write using standard business English;
- Type, word process, use adding machines, and enter data at an acceptable rate of speed;
- Use standard office software and learn to use proprietary accounting and related programs;
- Establish and maintain effective working relationships with coworkers, supervisors, customers and others encountered in the course of business.

PHYSICAL AND SENSORY REQUIREMENTS

- Sufficient eyesight to read fine statistical reports and standard text and data on computer terminal screens;
- Ability to speak and hear at normal conversational levels in person and over the telephone;
- Ability to lift and carry up to approximately twenty-five pounds; reach, bend, or crouch to use files and records;
- Manual dexterity to write legibly and to use calculators, computer terminals, and other general office machines.

TRAINING AND EXPERIENCE GUIDELINES

Any combination of training and experience, which demonstrates attainment of the required knowledge and ability to perform the required work (with reasonable accommodation, if needed), typically:

EDUCATION: Equivalent to graduation from high school.

EXPERIENCE:

CSR I - One year of clerical or accounting experience which has involved dealing directly with the public.

CSR II (in addition to the above) – Two to four years of customer service experience in a water agency, utility, or similar public service.

CERTIFICATIONS, LICENSES, AND REGISTRATIONS

A valid California class C driver’s license must be maintained at all times.