



POSITION DESCRIPTION

TITLE: CUSTOMER SERVICE REPRESENTATIVE I AND II

REPORTS TO: Accounting Supervisor

GRADE: 2, 3

FLSA: Non-Exempt

CONFIDENTIAL: Yes

SUPERVISORY RESPONSIBILITIES

DIRECT: None

INDIRECT: None

MINIMUM QUALIFICATION REQUIREMENTS

Unless required by law, experience and education may be substituted for each other upon approval by the General Manager or their designee. Certifications required by law for the position must be obtained within first year in the position.

EDUCATION: High School diploma or equivalent. Valid California driver's license and proof of insurability are required.

EXPERIENCE: Customer Service Representative I: Entry level classification in the Customer Service Representative series providing general and accounting service support. Minimum of one year of experience responding to customer inquiries within a customer service environment; excellent verbal and written communication skills; proven ability to organize and manage competing priorities; comprehensive ability to effectively utilize a personal computer and windows applications. Ability to constructively deal with conflict and provide effective resolutions.

Customer Service Representative II: Lead customer service representative who is capable of performing full range of customer service duties such as financial, customer service, and accounting office support duties. Minimum of three years of experience responding to customer inquiries within a customer service environment; excellent communication and verbal skills, proven ability to organize and manage competing priorities; comprehensive ability to effectively utilize a personal computer and Windows applications. Positions at this level are distinguished from the entry level classification by the performance of the full range of duties assigned, working independently, applying well developed customer service knowledge, and exercising judgment and initiative.

CONTACT RESPONSIBILITY

INTERNAL: Interaction with Supervisor to receive general work assignments and address administrative or technical issues; District personnel to coordinate assignments and resolve technical and billing issues, write-offs, adjustments and related issues; all other District personnel as required.

EXTERNAL: Interaction with customers to discuss and resolve their questions and issues; other public agencies to research customer inquiries; external mail, print house and/or computer consultants to obtain assistance on system operations; others as required by position duties.

PHYSICAL REQUIREMENTS

Good hearing, eyesight and speech; excellent ability to communicate both verbally and in writing; able to operate a computer keyboard and peripherals; able to tolerate periods of continuous sitting; may on an infrequent basis assist with lifting up to 50 pounds.

ENVIRONMENTAL CONDITIONS

Work is primarily performed within an enclosed office setting with lighting and ventilation. Subject to conversational noise from other personnel within the facility, along with standard background noise found in an office environment. Subject to long periods of sitting and exposure to computer screen. When performing work outside the facility, subject to variable weather conditions and possible exposure to heavy equipment, dust, fumes, odor and noise. Appropriate personal safety equipment is provided.

DETAILED DUTIES AND RESPONSIBILITIES - ESSENTIAL FUNCTIONS

This at will position responsibilities include handling all matters pertaining to customer service for the District. This position is expected to support the District Strategic Plan and Mission Statement by remaining informed and involved. Exhibit a willingness to assure successful inter-departmental relations. A working knowledge and understanding of District safety rules and regulations, as well as active participation in the District's safety programs is necessary. Stable, reliable attendance is required.

The following tasks are typical for this classification. Incumbents may not regularly perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business or staffing needs and changing business practices as defined by the General Manager.

% TIME	TASKS
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LEVEL	
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I	II
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40%	10%
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Perform general administrative and accounting support:

- Answer switch board phones, greets visitors, handle pick-ups and deliveries, direct inquiries to appropriate departments, process customer payments through cash register.
- Receive and process incoming, outgoing, and returned mail.
- Monitor and maintain adequate quantities of office supplies.
- Prepare a variety of forms and documents such as correspondence, notices, schedules, service information and requests using word processing, spreadsheets, and customized billing software.
- Maintain departmental files and records.
- Prepare delinquent notices, closing bills, and turn-off notices.
- Prepare and process service orders for field and meter reading personnel.
- Participate in District training events and meetings.

40%	40%
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Directly interface with the customer to assist with questions and issues regarding District services.

- Determine the nature of, research and respond to customer inquiries by referring to a computer database, files and/or District policies.
- Coordinate with other personnel as needed, including to relay information on customer inquiries and service requests.
- Interface with InfoSend customer service portal to assist with customer requests and inquires.
- Enter process and update all required information into the computer using District software program.

- Handle customer account transfers.
- Process and verify non-sufficient funds (NSF) checks received by the District, including notification to customers.
- Administer District Direct Payment Program (DPP).
- Administer District Agricultural Certified Program.

- 10%** **40%** Perform billing activities for the District:
- Prepare cycle billing for all customers utilizing District software program.
 - Prepare and send electronic files for bill creation.
 - Review billing reports, research, correct, and resolve customer's billing problems.
 - Complete billing process, review reports, and resolve programming issues.
 - Monitor past due accounts, including interface with District collection agency for collections action.
 - Reconciling and balancing monthly billing reports.
 - May adjust delinquent charges or arrange for a payment schedule, within scope of authority.
 - Organizes, maintains and assists with implementation of retention requirements for District files and data. Prepares a variety of reports, at management request.
 - Interface with meter readers to resolve billing matters, transfers, leaks, stopped meters, consumption variances, etc.
 - Process customer refunds on closed accounts.
 - Assist with process lien filing and payment arrangements.

DETAILED DUTIES AND RESPONSIBILITIES - NON-ESSENTIAL FUNCTIONS

- 10%** **10%** Performs all related duties as assigned.