



Customer Service Representative I

Department/Division:	Customer Service
Reports To:	Customer Service Supervisor
Provides Direction To:	Not Applicable
FLSA Exemption Status:	Non-Exempt
Effective Date:	12/19/2024

GENERAL PURPOSE

Under close supervision from the Customer Service Supervisor, to perform entry level customer service-related work involving customer contact by telephone, mail or in person; to accept and process payments from District customers; to dispatch field personnel; and to perform related work as required.

DISTINGUISHING CHARACTERISTICS

This class is the entry level class in the Customer Service Representative series. Incumbents may be assigned to the counter with responsibility for a cash drawer, or back office with other related customer service duties. This class is differentiated from Customer Service Representative II in that incumbents in the higher-level class are expected to work with greater independence and have responsibility for intermediate to moderately difficult and complex duties.

ESSENTIAL FUNCTIONS

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the class.

- Serves as a counter representative or telephone representative, accepting applications for service, closing accounts, answering customer account inquiries, and providing routine changes to accounts within established standards and guidelines; provides a professional image to customers, co-workers, and other agencies.
- Receives and maintains records of cash with accuracy; prepares money for bank deposit.
- Assists in collecting and processing night drop payments, computer payments, and payments received from satellite locations.
- Learns to interpret customer accounts and to apply account-related District rules and guidelines, in order to assist customers in resolving account related problems.
- Assists customers with delinquent balances to understand the District's policies relating to delinquent accounts.
- Learns to interpret customer accounts and to apply knowledge of applicable District rules and guidelines, in order to assist customers in resolving account related problems.
- Assists customers with delinquent balances to understand the District's policies relating to delinquent accounts.

- Answers all incoming telephone calls and transfers to the appropriate department; assists in providing a variety of information to customers both in person and on the telephone on District policies and services.
- Assists in researching status and provides current information on customer accounts as requested using basic proficiency on computer system.
- Assists in preparing clear and concise correspondence and basic level spreadsheets for simple issues.
- Inputs a variety of data into an assigned computer system.
- Accurately maintains account records and documents.
- Sends letters to owners when tenants sign up for service.
- Prepares new sign-up packages, mail to customers, and keeps materials stocked.
- Uses a motor vehicle to pick up and drop off mail; sorts and processes all incoming and outgoing mail. Issues appropriate work orders and dispatches field personnel by two-way radio.
- Assists other office personnel in clerical, accounting, and billing functions, as necessary.
- Uses a motor vehicle to pick up and drop off mail; sorts and processes all incoming and outgoing mail.
- Issues appropriate work orders and dispatches field personnel by two-way radio.
- Assists other office personnel in clerical, accounting, and billing functions, as necessary.
- Participates in District safety meetings.
- Maintain prompt and regular attendance.
- Performs other related duties as assigned.

QUALIFICATIONS GUIDELINES

Knowledge of:

- Effective customer service methods, practices and techniques.
- Basic English usage, spelling, grammar and punctuation.
- Modern office practices, equipment, and procedures.
- Telephone techniques and etiquette.
- Data control procedures and data entry operations.
- Personal computer operation and related software applications including basic level Microsoft Office, e-mail, accounting and web-based communication tools.
- Research techniques, methods, and procedures.
- Safe work practices.
- Learn water use efficiency and conservation principles.

Ability to:

- Learn to examine source documents and review for accuracy and discrepancies.
- Perform detailed arithmetical calculations quickly and accurately.
- Learn to interpret customer accounts and explain District policies, rate ordinances and services.
- Enter and verify data.
- Update and maintain a variety of records.
- Follow direction in assembling data, preparing accurate reports, and maintaining detailed records; prepare routine business correspondence, under guidance and review.
- Establish and maintain cooperative working relationships with others.
- Communicate clearly and concisely, orally and in writing.
- Answer telephones and be tactful and courteous to the public.

- Operate standard office equipment, personal computers, postage machine and related customer service, accounting, and billing software.
- Keyboard at 30 wpm and operate a 10-key calculator by touch.
- Observe proper safety precautions.
- Learn and explain sources of water supply and water use efficiency principles and practices and perform water audits.

Minimum Qualifications

Any combination of education, training, and experience that would likely provide the knowledge, skills, and abilities to successfully perform in the position is qualifying. A typical combination includes:

Education: A high school diploma or satisfactory equivalent is required and preferably supplemented by the completion of at least two (2) college level courses in accounting, finance, business administration, or related subjects.

And

Experience: One (1) year previous experience in customer service, cashiering, data entry and/or accounting related work is highly desirable.

Licenses, Certificates; Special Requirements:

Possession of a valid Class C California driver’s license, acceptable driving record.

In accordance with California Government Code Section 3100, West Valley Water District employees, in the event of a disaster, are considered disaster service workers and may be asked to protect the health, safety, lives, and property of the people of the State.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this classification, an incumbent is regularly required to use hands and fingers to handle or feel. The employee is frequently required to talk, hear, and to sit and reach with hands and arms. The employee is occasionally required to stand, walk, climb or balance and stoop, kneel, crouch or crawl. The employee must regularly lift and/or move up to ten (10) pounds, frequently lift and/or move up to twenty-five (25) pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus. Sensory demands include the ability to see within the normal range, talk, and hear, and use electronic touch keypads.

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret data; use math and mathematical reasoning; analyze and solve problems; learn and apply new information; perform highly detailed work on multiple, concurrent tasks while meeting deadlines; interact with District officials, staff, management, the general public, and others during the course of work.

THIS POSITION MAY BE ELIMINATED, OR THE DUTIES, QUALIFICATIONS AND TRAINING REQUIRED CHANGED BY THE BOARD OF DIRECTORS AND/OR THE GENERAL

MANAGER, WHEN IN THEIR JUDGEMENT, IT IS CONSIDERED NECESSARY AND PROPER FOR THE EFFICIENT OPERATION OF THE DISTRICT.