



## Customer Service Representative II

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 general supervision from the Customer Service Supervisor, to perform intermediate 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 journey level in the Customer Service Representative series and is differentiated from the Customer Service Representative I in that incumbents are expected to work with greater independence and have responsibility for intermediate to moderately difficult and complex duties involving customer accounts and utilize strong computer skills and proficiency in working with the District's computer system. This class is further distinguished from the Customer Service Representative III in that the higher level is the advanced technical class in which incumbents perform more complex customer service-related tasks and support to the Customer Service Supervisor.

### 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.
- Collects and processes night drop payments, computer payments, and payments received from satellite locations.
- Interprets customer accounts and applies knowledge of applicable District rules and guidelines, in order to assist customers in resolving the more complex account related problems.
- Assists customers with delinquent balances to understand the District's policies relating to delinquent accounts; creates payment plans.
- Answers 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.

- Researches status and provides current information on customer accounts as requested using full proficiency of the computer system.
- Prepares clear and concise correspondence and intermediate level spreadsheets for more complex issues.
- Monitors, reviews, and participates in a variety of water conservation related activities; informs and educates customers about efficient water use and water conservation.
- Gathers, analyzes, and interprets data and information for the evaluation of water conservation rebate programs.
- 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 keep 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.
- Orders office supplies, as required.
- Assists in resolving the more complex customer service issues and complaints.
- Trains Customer Service Representative I's and other support staff.
- Performs all of the duties of a Customer Service Representative I, as required.
- Cross trains to assist in billing or accounting functions, as necessary.
- Participates in District safety meetings.
- Maintain prompt and regular attendance.
- Performs other related duties, as assigned.

## **QUALIFICATIONS GUIDELINES**

### **Knowledge of:**

- Principles, methods and practices of financial and customer account record keeping work.
- Effective customer service methods, practices and techniques.
- District policies, rules, procedures and regulations involved in the establishment of customer accounts, customer billing and account collections.
- 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.
- Water use efficiency and conservation principles.

### **Ability to:**

- Examine source documents and review for accuracy and discrepancies.
- Perform detailed arithmetical calculations quickly and accurately.
- Interpret customer accounts and explain District policies, rate ordinances and services.
- Enter and verify data and utilize computer system with full proficiency.
- Update and maintain a variety of records.

- Follow direction in assembling data, preparing accurate reports and maintaining detailed records.
- Handle difficult and complex customer service issues.
- Prepare routine business correspondence.
- 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.
- 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, supplemented by the completion of at least three (3) college level courses in accounting, business administration, information technology, or related subjects.

**And**

**Experience:** Two (2) years of progressively responsible experience in customer service, cashiering, computerized billing and accounting related work of similar volume and complexity.

### **Licenses, Certificates; Special Requirements:**

Must possess an appropriate valid Class "C" Driver's License issued by the California State Department of Motor Vehicles, and a good driving record.

Possession of an AWWA Water Use Efficiency License is highly desirable.

Possession of a Grade I Water Distribution Operator's Certificate is highly desirable.

Possession of a Cash Handler Certificate and/or CMRTA Certified Revenue Officer Certificate is highly desirable.

### **PHYSICAL AND MENTAL DEMANDS**

The physical demands described below are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions on a case-by-case basis.

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.

***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.***