



Customer Service Representative III

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 advanced-level customer service-related work involving customer contact by telephone, mail or in person; to accept payments from District customers; to provide technical assistance to the Customer Service Supervisor; and to perform related work as required.

DISTINGUISHING CHARACTERISTICS

This class is the advanced level in the Customer Service Representative series and is differentiated from the Customer Service Representative II in that incumbents are expected to work with greater independence and serve at an advanced level. Incumbents perform complex technical customer service-related tasks and reports, handles difficult customer complaints and issues, and has responsibility for providing support and technical assistance to the Customer Service Supervisor. This class is further distinguished from the Customer Service Lead in that the higher-level is the lead technical class in which incumbents lead, train, and monitor customer service staff and actively contribute to the planning, implementation, and assessment of division activities, services and programs.

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; reconciles deposit applications.
- 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 advanced level spreadsheets for most 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.
- Orders office supplies, as required.
- Works directly with employees in other District departments to resolve issues and to improve processing and communication within departments.
- Assists the Customer Service Supervisor with special projects and assignments.
- Researches and resolves the most difficult and complex customer service issues.
- Trains Customer Service Representatives I and II and other support staff.
- Performs all of the duties of Customer Service Representatives I and II, as required.
- Cross trains to assist in billing and 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, 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.
- Use independent judgment in maintaining and adjusting a variety of financial and statistical records related to customer accounts.
- Perform detailed arithmetical calculations quickly and accurately.

- Interpret customer accounts and explain District policies, rate ordinances and services.
- Handle the most difficult and complex customer service issues.
- Enter and verify data and utilize computer system with advanced proficiency.
- Update and maintain a variety of records.
- Assemble data, prepare accurate reports and maintain detailed records.
- Prepare 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.

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: An Associate degree from an accredited college or university in finance, accounting, business administration or a closely related field.

And

Experience: Three (3) years of progressively responsible experience in customer service, cashiering, computerized billing and accounting related work of similar volume and complexity. Experience in a lead capacity is highly desirable.

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 Grade I Water Treatment 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 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 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.

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.