



## **CUSTOMER SERVICE REPRESENTATIVE I**

Department: Customer Service  
Range:

FLSA Status: Non-Exempt  
Effective Date: September 1, 2010

### **General Purpose**

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

### **Distinguishing Characteristics**

This class is the entry/training level 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 the 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 Duties and Responsibilities**

The duties and responsibilities listed below are intended to provide a representative list of the various types of work that may be performed. Specifications are not intended to reflect all duties performed within the job class, and incumbents may expect to perform other related similar duties.

- 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 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.
- Accurately files 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.
- Participates in District safety meetings.
- Performs other related duties, as assigned.

### **Qualifications**

#### ***Knowledge of:***

- Effective customer service methods, practices and techniques.
- Basic English usage, spelling, grammar and punctuation.
- Modern office practices, equipment, and procedures.
- 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.

***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.
- Be tactful and courteous to the public.
- Operate standard office equipment, personal computers, 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:***

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

***Experience:***

Previous experience in customer service, cashiering, data entry and/or accounting related work is highly desirable.

**Necessary 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.

**Physical Tasks and Environmental Conditions**

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.

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Advancement in salary is not automatic. It should be considered a reward for meritorious service. The General Manager may authorize the advancement of an employee who has performed twelve (12) months continuous satisfactory service.

An employee who furthers his/her knowledge in the field or employment may become eligible for consideration of a salary review by the General Manager. The General Manager may authorize reimbursement to the employee for cost of tuition, registration fees, required text books, certification costs and other related charges upon proof of receiving a passing grade, and /or certificate, whichever may be appropriate or both.

***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.***