



CLASSIFICATION SPECIFICATION

CUSTOMER SERVICE REPRESENTATIVE III

DEFINITION:

Under general supervision, performs advanced level and/or lead customer service related work involving customer contact by telephone and in person; performs customer billing and account maintenance as a primary function; performs highly responsible office administrative duties; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

This class is the advanced, senior-working level in the Customer Service Representative series. At this level, incumbents perform the most complex and specialized work tasks, under general supervision, while exercising broader discretion and independent judgment within established guidelines. Incumbents at this level may also work in a lead role and participate in the training of Customer Service Representative I's and II's.

SUPERVISION RECEIVED/EXERCISED:

Receives general supervision from the Accounting Manager. Exercises lead direction over Customer Service Representative I's and II's.

ESSENTIAL FUNCTIONS: *(include but are not limited to the following)*

*Class specifications are only intended to present a description summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not** include all duties performed by individuals within a classification. In addition, specifications are intended to outline the minimum qualifications necessary for entry into the class and do not necessarily convey the qualifications of the incumbents within the class.*

- Serves as District receptionist and receives centralized phone calls; provides a variety of information to customers and the general public related to District services and activities; refers callers to appropriate individual or department, as required.
- Responds to customer requests in person or by telephone, mail, fax or computer, to add or terminate residential or commercial water service accounts; explains billing practices and rates; processes turn-on and turn-off requests, accounts, re-reads and other field work orders; uses radio to contact employees in the field.
- Responds to customer inquiries and complaints regarding District service referred by staff for difficult or complex cases; routinely handles a variety of problems related to concerns with the accuracy of meter readings, high consumption, delinquent accounts, non-reads, and improper billings; provides information on cost for various types of service installations; processes new services/tracts; performs a variety of functions in receiving and processing service requests; applies District policies and regulations regarding establishment and maintenance of services.
- Receives and processes billing payments; receives monies from the public in the form of cash or check; endorses checks; makes change; records receipt of payments; counts

cash; performs fiscal record keeping work.

- Maintains records of past due customer accounts; prepares delinquent bill reminders and past due notices; sets date for service shut-off for non-payment; processes NSF checks; processed delinquent closed accounts and liens in accordance with established District policy; reverses late fees and delinquent processing charges within authority levels when warranted by the circumstances.
- Prepares and posts account, service, comment and payment data to customer records by computer; processes credit card payment requests; assists in generating and preparing billing statements for mailing; reviews preliminary billing ledger reports prior to processing bills; performs nightly update.
- Performs a wide variety of administrative tasks including typing letters, memos, and data entry; maintains files and processes mail.
- Interprets customer accounts by using knowledge of applicable District rules and guidelines, and assists customers in resolving account related problems with broader discretion.
- Analyzes customer credit history and determines approval of extensions and waiver of deposits.
- Participates in cross training and provides back up to other department staff; assists other office personnel in performing related administrative support functions; serves as a back-up to Accounts Payable and Payroll; assists with processing sewer applications and accepts plans and payments.
- Notarizes documents for lien properties due to non-pays; releases liens.
- Establishes positive working relationships with District staff and the general public.
- Assumes responsibility for ensuring the duties of the position are performed in a safe, efficient manner.
- Works weekends, evenings and holidays as required to accommodate the District's needs, in addition to responding as a Disaster Emergency Service Worker.
- Performs other related duties as assigned.

PHYSICAL, MENTAL AND ENVIRONMENTAL WORKING CONDITIONS:

The essential functions of this position may require the employee to perform the following physical activities. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

- Work in an office environment with some exposure to dust, dirt, and hazardous materials.
- Stand, walk and sit for extended time periods; able to carry, push, pull, reach and lift objects of light to medium weight; hearing and vision within normal ranges.

- Communicate orally with District management, co-workers, and the public in face-to-face, one-to-one and group settings; regularly use a telephone and two-way radio for communication.
- Read and interpret complex data, information and documents; analyze and solve complex problems; use math/mathematical reasoning; perform highly detailed work under changing, intensive deadlines, on multiple concurrent tasks; work with constant interruptions, and interact with all levels of District management, board members, other elected and appointed governmental officials, media representatives, business and community leaders, employees, the public and others encountered in the course of work.
- Operate office equipment including use of computer and keyboard; work at a desk and computer for extended time periods; look at computer monitor for extended time periods.
- Travel by vehicle while conducting company business.

QUALIFICATIONS: *The following are minimal qualifications necessary for entry into the classification.)*

Education and/or Experience

Any combination of education and experience that would likely provide the necessary knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be graduation from high school or equivalent and five (5) years of experience in all aspects of customer service accounts management and billing work.

License/Certificate:

Possession of a valid Class C California driver's license and satisfactory driving record.

Possession of or ability to obtain a certificate, as a Notary Public of the State of California, within one (1) year of appointment date.

KNOWLEDGE/SKILLS/ABILITIES: *(The following are a representative sample of the KSA's necessary to perform essential duties of the position.)*

Knowledge of:

- Advanced customer service and customer relations practices and principles.
- Advanced principles, methods, and practices of financial and customer account record keeping work.
- Daily cashiering procedures and duties.
- District policies, rules, procedures, and regulations involved in the establishment of customer accounts, customer billing, and account collections.
- Customer Service, Billing, Account management system software and procedures, at an advanced level.
- English usage, spelling, grammar and punctuation.
- Modern office practices, equipment, and procedures.
- Computer systems and software applications.
- District organization, functions and policies.
- Water and sewer related services.

- Safe work methods and safety regulations.

Ability to:

- Instruct and train others in District customer service policies and procedures and equipment.
- Prepare complex reports and keep detailed records.
- Examine source documents and review for accuracy and discrepancies.
- Perform detailed and complex arithmetical calculations quickly and accurately.
- Interpret customer accounts and consumption records, and explain District policies.
- Handle difficult customer complaints and provide effective resolutions within established guidelines.
- Maintain a variety of financial and statistical records related to customer service.
- Exercise a high degree of independent judgment and initiative within established guidelines
- Operate standard office equipment, personal computers, and related software.
- Communicate clearly and concisely, orally and in writing.
- Be tactful and courteous to the public.
- Effectively represent the District, including its programs and policies with the public.
- Establish and maintain effective working relationships with all levels of District management, employees, the public and others encountered in the course of work.
- Provide excellent customer service and resolve public concerns and complaints.
- Understand and follow oral and written directions.
- Work effectively with a small group or individually.
- Skillfully and safely operate a motor vehicle when required in the course of performing work duties.

STATUS: Non-Exempt

Revised: February 15, 2015