



## Job Description

*Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job.*

<b>Job title</b>	Assistant Customer Service Advisor/Customer Service Advisor
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### GENERAL PURPOSE

Under immediate (Assistant Customer Service Advisor) to general (Customer Service Advisor) supervision, performs a variety of routine to complex customer service functions including providing information, researching problems, performing collection and credit arrangements, by telephone, email, fax, and in person; reviews usage reports to identify patterns of high usage; and performs related duties, as assigned.

### DISTINGUISHING CHARACTERISTICS

Assistant Customer Service Advisor: This is the entry-level classification in the Customer Service Advisor series. Initially under close supervision, incumbents learn and perform routine a variety of services to the District's diverse customer ranging from answering general water service questions, providing information, handling customer relations situations on utility accounts. As experience is gained, assignments become more varied, complex, and difficult; close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the Customer Service Advisor level but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

Customer Service Advisor: This is the fully qualified journey-level classification in the Customer Service Advisor series. Positions at this level are distinguished from the Assistant Customer Service Advisor by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

This class is distinguished from the Senior Customer Service Advisor in that the latter performs the more complex work assigned to the series, such as providing functional and technical direction to lower level staff.

## **SUPERVISION RECEIVED AND EXERCISED**

Receives immediate supervision (Assistant Customer Service Advisor), general supervision (Customer Service Advisor) from the Customer Service Supervisor. Exercises no direct supervision over staff.

## **TYPICAL DUTIES AND RESPONSIBILITIES**

*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 this position.*

*Positions at the Assistant Customer Service Advisor level may perform some of these duties and responsibilities in a learning capacity.*

- Responds to customer inquiries and complaints in person, by telephone, fax, and email, and provides information regarding water consumption, or billing issues; handles escalated calls and irate customers; provides for the resolution of unusual billing and customer cost situations by conducting appropriate research, reviewing findings, making appropriate recommendations, and processing billing adjustments if applicable.
- Performs the full range of duties as related to customer service including opening and closing accounts, providing and receiving account information, researching account detail, determining eligibility for payment arrangements, and processing payments; resolves issues and problems regarding the processing of orders and delinquent accounts; generates shut-off list; processes variance forms.
- Performs reception duties, directs district traffic for multiple departments, represents the District to callers and visitors in a professional and customer friendly manner and ensures visitors log is maintained; provides coverage for telephone operator; performs cashier duties accepting cash and credit payments over the phone, in person, and online, issuing receipts of payment, balancing accounts, and preparing deposits; assists with business payments and preparing bank deposits.
- Assists walk in customers with billing questions and making payment arrangement, processes variance request forms; assists Billing and Collection Departments; posts payments received via after hours “night-drop” along with other incoming specialty payments received; balances cash drawer at the end of the day; troubleshoots customer’s technical issues with IVR and VS; assists customers program backflow keys, questions regarding possible leaks, low water pressure, how to check for leaks, and conservation tips on how to reduce their water usage.
- Performs a variety of general administrative support duties including front desk and telephone reception, preparation of correspondence, filing, and processing mail.

- Reviews computer-generated reports of daily meter read books and usage reports, graphs consumption and payment patterns; evaluates meter readings outside normal parameters; requests field tests of meter accuracy and usage and initiates adjustments to customer accounts to correct errors; files police reports for theft and illegal connections.
- Assists field staff in dealing with difficult customer situations; reviews daily turn-off accounts for payments received or approved credit arrangements and pulls turn-off notices when warranted; reviews account record history to approve customer credit arrangements through field representatives; set up at-the-source turn offs; prepares field service orders for follow-up on problem accounts and corrects problem account record.
- Researches and posts rejected payment; approves or negotiates payment and credit arrangements; adjusts credit arrangements when warranted; initiates balance transfers to new accounts and customer refund payments; calculates and processes billing adjustments; processes manual adjustments and credits to customer accounts; updates billing system database on account problems and resolution.
- Researches and processes payments for miscellaneous accounts receivable, other than water and sewer bill payments, as required.
- Performs dispatch duties including, but not limited to, checking out and assigning work to CSFR's, dispatching orders, reviewing accounts; reviews customer orders and determine necessary actions.
- Observes and complies with all District and mandated safety rules, regulations, and protocols.
- Performs related duties as assigned.

#### **REQUIRED QUALIFICATIONS**

*Positions at the Assistant Customer Service Advisor level may exercise some of these knowledge and abilities statements in a learning capacity.*

#### Knowledge of:

- Practices and procedures related to accounting for receipts and the maintenance of customer accounts.
- Codes, regulations, policies, and procedures related to District and department operations.
- Business arithmetic and basic statistical techniques.
- Basic business letter writing and the standard format for reports and correspondence.
- Record keeping principles and procedures.
- District water and sewer rules and regulations in assigned areas of responsibility.
- Meter service operations as they relate to customer service.

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- Characteristics of the District's customer base and usage patterns, including typical causes for high consumption.
- Methods, practices and processes for billing, collections and credit.
- Cash handling techniques.
- Methods and techniques of reconciling and balancing payments.
- Laws and regulations governing collections processes.
- District and mandated safety rules, regulations, and protocols.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Define issues, analyze customer problems, evaluate alternatives and develop sound conclusions and recommendations; manage time effectively.
- Receive, process and balance customer payments.
- Determine payment plan options for customers.
- Review usage reports and identify consumption patterns.
- Research and resolve customer issues and/or refer to higher level staff.
- Follow and apply written and oral work instructions.
- Prepare clear, accurate and concise correspondence, records and reports.
- Maintain sensitive and confidential information.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards in assigned areas of responsibility.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Experience:

*Any combination of experience and education that provides the required knowledge and abilities is qualifying, along with the specific licenses/certifications as outlined below:*

- Assistant Customer Service Advisor: One (1) year of customer service program experience, preferably in a public utility.

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- Customer Service Advisor: Two (2) years of customer service program experience, preferably in a public utility, or (1) year of experience as an Assistant Customer Service Advisor with the District.

Education:

- Assistant Customer Service Advisor/Customer Service Advisor: Equivalent to completion of the twelfth (12th) grade.

Licenses/Certifications:

- None.

**PHYSICAL DEMANDS**

*The physical 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.*

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

**WORK ENVIRONMENT**

*The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

## **FLEX REQUIREMENTS**

Positions in the Customer Service Advisor class series are flexibly staffed; positions at the Customer Service Advisor level are normally filled by advancement from the Assistant Customer Service Advisor level; progression to the Customer Service Advisor level are dependent on (i) management affirmation that the position is performing the full range of duties assigned to the classification; (ii) satisfactory work performance; (iii) the incumbent meeting the minimum qualifications for the classification including any licenses and certifications; and (iv) management approval for progression to the Customer Service Advisor level.

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This job description has been reviewed and approved by all levels of management in cooperation with the union (if applicable):

<b>Approved by:</b>	<i>Board of Directors</i>
<b>Date adopted:</b>	<i>March 29, 2020</i>
<b>Date modified:</b>	
<b>FLSA determination:</b>	<i>Non-Exempt</i>

**Job Description Acknowledgment**

*I have received, reviewed and fully understand the job description for Assistant Customer Service Advisor/Customer Service Advisor. I further understand that I am responsible for the satisfactory execution of the essential functions described therein, under any and all conditions as described.*

*Employee Name (print):* \_\_\_\_\_ *Date:* \_\_\_\_\_

*Employee Number:* \_\_\_\_\_

*Employee Signature:* \_\_\_\_\_