JOB DESCRIPTION
Customer Service Representative I (Flex)
Customer Service Representative II (Flex)
Customer Service Representative III
Code Number: 16008, 16009, 16014

GENERAL PURPOSE

Under general supervision, performs a variety of routine to complex customer service functions including providing information, researching problems, performing collection and credit arrangements, by telephone and in person; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS
Customer Service Representative I is the entry-level class in the Customer Service Representative series. Initially under close supervision and guidance, incumbents provide a variety of services to the District's diverse customer base by telephone and in person, ranging from answering general water service questions and providing information to handling difficult customer relations situations on utility accounts. This class is alternately staffed with Customer Service Representative II and Customer Service Representative III, and incumbents may advance to the higher levels after gaining experience and demonstrating proficiency which meet the qualifications for the higher-level classes.

Customer Service Representative II is the first working level class in this series, fully competent to independently perform all but the most difficult duties.

Customer Service Representative III is journey level class of the series and is distinguished from the lower level Customer Service Representative classifications by the full scope of duties that are assigned and the relative independence with which duties are performed. This class is further distinguished from Senior Customer Service Representative in that the latter serves as either a lead or advanced-journey level in the series.

ESSENTIAL 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 class.
Acts as the initial point of contact for District water and sewer customers; performs various customer service duties including opening and closing accounts, providing and receiving account information, researching account detail, determining eligibility for payment arrangements, and processing payments.

Responds to customer requests in person or by telephone, mail and fax to initiate, add to or terminate residential, commercial and agricultural water service accounts; obtains required account information data; enters the data on-line into the District's customer account system (COINS); explains billing practices and rates; processes service turn-on or -off field work orders via COINS; records information in customer account records.

Answers correspondence and questions by telephone and in person about utility bills; reviews on-line consumption history; conducts research to answer customer inquiries; submits field work orders via COINS for meter re-reads and meter tests on problem accounts; reviews field results; estimates, recommends and enters billing adjustments; follows up with customers to provide information on actions taken; enters account comments and data on account problems and actions taken in COINS.

Works with delinquent account customers to establish credit arrangements to avoid shut-off; requests the preparation of credit arrangement letters for signature.

Responds to and resolves customer account questions, problems and complaints; verifies customer account information by telephone, mail or fax; submits emergency and non-emergency requests for field service orders for meter repairs, investigation of water leaks and other problems; records service comments in COINS customer account records; reverses delinquency charges and security deposits within authority levels, when warranted by the circumstances.

Responds to customers who are irate or who have complex, specialized or unusually sensitive account or credit situations, or refers unresolved situations to a supervisor or senior representative.

Reviews delinquent account printouts and customer account information; makes determinations of accounts to be shut off and processes shut off work orders via COINS; reviews delinquency and collections reports; determines whether credit arrangements have been made or other changes in account status have occurred; refers delinquent unpaid accounts to the division collections
representative in accordance with division guidelines; determines whether delinquent account balances can be transferred to new customer accounts; reviews delinquent unpaid accounts for closure and write-off; provides advice and guidance to other representatives on credit arrangements and delinquency account problems; assists in training new representatives on these functions.

When assigned to the Delinquency Desk as a delinquent account representative, takes over responsibility for difficult and volatile customer relations situations involving credit requirements and delinquencies; negotiates and approves payment plans and dates to resolve delinquent account situations; prepares credit arrangement letters for signature; determines delinquency charges and security deposit requirements on delinquent and defaulted accounts; waives charges or extends credit arrangements based on customer payment history and when circumstances warrant; notifies Customer Service Field Representatives by radio to pull turn-off orders when late payments are received; receives information from field representatives regarding meter problems, leaks and possible illegal water use; processes field service orders to correct problems via COINS; may request police reports when illegal activity has been identified.

When assigned to the Domestic Desk, reviews daily outgoing work orders to determine if they need to be sent to the field for a meter read, lock off or turn off; review incoming work orders to ensure meter reads are consistent with that accounts previous meter read pattern; researches and determines responsibility for water usage at unregistered meters; reviews reports for illegal turn on charges; activates and closes accounts; gives credit adjustments to accounts where it is determined that the meter was misread; manages the work order process and ensure that appropriate amount of work is being given to the Customer Service Field Representatives.

When assigned to the Front Counter, determines and fulfills the needs of walk in customers including receipt of payment, answers billing questions, and assists in making payment arrangements; posts payments received via after hours “night-drop” along with other incoming specialty payments received, e.g. District Retiree Medical payments; receives payments for plans and specification books; works out of cash drawer, makes change and balances cash drawer at the end of the day; reviews account of meter change-outs and send notification of change-out.

Provides the full range of customer service functions and services in Spanish to Spanish-speaking customers.

Responds to a variety of customer mail inquiries, including requests for information on new service requirements and conservation programs; generates
customer credit references; conducts research on returned mail; data enters address and name changes; notes new information in COINS.

When requested, researches and processes payments for miscellaneous accounts receivable other than water and sewer bill payments.

Participates in cross-training and refresher training; assists in training new employees, temporary employees and summer interns.

Performs related duties as assigned.

**DESIRED MINIMUM QUALIFICATIONS**

**Knowledge of:**

Customer service practices and customer-oriented telephone etiquette; standard office practices and procedures; sound business communication practices; correct English usage, including spelling, grammar and punctuation; District water and Sewer Rules and Regulations and meter service operations and issues; characteristics of the District's customer base, including typical causes for high consumption; various department-specific functions that affect customer service; various department-specific computer programs such as: Sport, Crims, Maximo, Win2Data Small World, and Excel; policies and procedures for billing, collections and credit; the operations, uses and requirements of COINS.

**Ability to:**

Operate an on-line computer terminal, sophisticated telephone equipment and other standard office equipment; handle tactfully and effectively sensitive customer relations situations and defuse situations that are highly emotional and volatile; quickly, efficiently and calmly handle a high volume of customer interactions by telephone and in person; interpret, explain and apply complex District rules regarding water and sewer service rates and policies; reach sound decisions in accordance with rules and policies; follow and apply written and oral work instructions; communicate effectively orally and in writing; make sound independent judgments within established guidelines; prepare clear, accurate and concise computer entries and basic correspondence; maintain sensitive and confidential information; use tact, discretion, patience and understanding in dealing with customers and the public; establish and maintain effective working relationships with those contacted in the course of work.
Training and Experience:

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from high school or G.E.D. equivalent and one year of office administrative or customer service experience, or an equivalent combination of training and experience. Experience in customer service functions in a government or public utility setting is highly desirable.

A Customer Service Representative I may be considered for advancement to Customer Service Representative II after demonstrating proficiency to perform all the major duties assigned to the class.

Typically, a Customer Service Representative I is expected to be capable of meeting the proficiency criteria within a 12-18 month period, depending on an individual's prior experience and progression in performing the full range of Customer Service Representative duties as described in the established proficiency criteria.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are associated 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.

Physical Demands

While performing the duties of this class, employees are regularly required to sit; talk or hear, both in person and by telephone; and use hands repetitively to operate, finger, handle or feel office equipment; and reach with hands and arms. Employees are frequently required to stand and walk.

Specific vision abilities required by this job include close vision, distance and the ability to adjust focus.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret complex data and information; make arithmetic calculations; analyze and solve customer problems; observe and interpret situations; learn and apply new information; rapidly perform highly detailed work on multiple, concurrent tasks; work with
constant interruptions; interact with District staff, customers who are often upset and dissatisfied and the public.

WORK ENVIRONMENT

The work environment characteristics described here are representative to 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 under office conditions involving a public counter, high telephone volume and a radio dispatch function and the noise level is moderate.

Employee performance is subject to random, periodic work monitoring, including telephone monitoring as well as quality sampling of correspondence and applications processed and adjustments made to accounts.
LENGTH OF TIME REQUIRED

A Customer Service Representative I may advance or “flex” to the Customer Service Representative II class after 12-18 months of experience in the Customer Service Representative I class. A Customer Service Representative II may advance or “flex” to the Customer Service Representative III class after 12-18 months of experience in the Customer Service Representative II class.

PERFORMANCE RATING

The incumbents must receive an overall performance rating of “Meets Expectations” or better on their most recent annual performance evaluation in order to flex to the higher class.

COMMENTS

The Customer Service Representative I must also satisfactorily complete the division’s customer service training program, having demonstrated proficiency in competently performing all major customer service functions within the division’s area of assigned responsibility, as described in the Customer Service Representative I/II/III job description.

I. Customer Service Representative (CSR) II Performing Call Center Operations Duties.

In order to flex to a Customer Service Representative (CSR) II performing Call Center Operations duties, the following requirements must all be met:

☐ Minimum of 12 months as a CSR I
☐ Have a minimum rating of 3 on all review areas.
☐ Accomplish Call Center duties in the Critical Task list booklet.
☐ Maintain quality of work performed per department standards.
☐ Satisfactory performance at the Front Desk
In order to flex to a Customer Service Representative (CSR) III performing Call Center Operations duties, the following requirements must all be met:

1. **Minimum of 18 months as a CSR II**
   1. CSR III must demonstrate competency and satisfactorily perform all duties required of the CSR II. Demonstrate competency and the ability to communicate effectively and clearly with customer correspondence.

   *These time frames will be used as a guide in determining an employee’s ability to perform the duties of each station. During this period, the quality and quantity of work will be reviewed. At that time, the supervisor will, with employee input, determine if further training will be provided or other options will be reviewed.

**BE PROFICIENT IN THE FOLLOWING AREAS:**

1. Knowledge of customer information system codes that apply to the Billing Section and be able to explain their functions and effects.

2. Ability to identify and explain the information, which can be found on each screen in customer information system.

3. Ability to calculate and explain water/sewer bills for the following per the CRITICAL TASK list:
   - T-meters
   - DC accounts
   - Multiple living units
   - Commercial/Compound meters

**Front Counter**

1. Must be professional and courteous.

2. Need to count cash back accurately, take credit card payments, process payments in the Quadrant Cashiering System.

3. Must be balanced out by 4:00 p.m. Average balancing time should be approximately 30 minutes. The overage/shortage should not exceed $5.00 more than twice a month.

4. Basic knowledge of the different departments within the District and their functions.

5. Ability to open and close batches according to the procedure for payments at the front counter and the night drop payments.
6. Ability to enter data clearly, accurately and meet deadlines.

7. Need to process credit card payments accurately for the New Business Development Representatives.

II. Customer Service Representative (CSR) II Performing Billing Duties.

In order to flex to a Customer Service Representative (CSR) II performing billing duties, the following requirements must all be met:

☐ Minimum of 12 months as a CSR I
☐ Have a minimum rating of 3 in all review areas.
☐ Accomplish all billing related duties in the Critical Task list booklet.
☐ Demonstrated proficiency in Delinquency, Domestics, and Refunds

In order to flex to a Customer Service Representative (CSR) III performing Billing duties, the following requirements must all be met:

1. CSR III must demonstrate competency and satisfactorily perform all duties required of the CSR II;
2. Must satisfactorily demonstrate competency on the delinquency, domestics and billing desks.

*These time frames will be used as a guide in determining your ability to perform the duties of each station. During this period, the quality and quantity of your work will be reviewed. Your supervisor, with your input, will review your ability to perform the required duties. At that time, the supervisor will determine if further training will be provided or other options will be reviewed.

**BE PROFICIENT IN THE FOLLOWING AREAS:**

1. Knowledge of customer information system codes that apply to the Billing Section and be able to explain their functions and effects.

2. Ability to identify and explain the information, which can be found on each screen in customer information system.

3. Ability to calculate and explain water/sewer bills for the following per the CRITICAL TASK list:

   T-meters
DC accounts  
Multiple living units  
Commercial/Compound meters

**Processing Domestics (On/Off Orders - Rereads)**

1. Ability to process minimum of 200 outgoing domestics daily in a 3 hour maximum time frame. Includes alphabetizing and sorting.

2. Ability to process minimum of 200 incoming domestics, to include reviewing each account and activating in a 3-hour maximum time frame on a daily basis.

3. Ability to review the accounts that have printed on/off request, keeping in mind the dates that coincide with each other. Billing for any Off With Consumption (OWC), notifying the billing desk of accounts that need to be manually billed.

4. Ability to keep current on any and all accounts that need additional fees assessed, assessing these fees, sending customer letters, making problem files and commenting accounts. This must be done on a weekly basis.

5. All alphabetizing of incoming domestics and filing will be done by the department clerical assistant.

6. Ability to assess charges, such as Self Turn ONs (STO), send customer letters and notate accounts clearly and accurately. This paperwork is ongoing and needs to be kept current. A customer's problem file needs to be returned to the filing cabinet when it is completed.

**Delinquency Desk**

1. Ability to operate the radio and communicate with the field reps and with other departments. This includes the ability to relay accurate information to other agencies, filing of police reports, calling 911 for emergencies, and requesting police escorts to problem properties while handling multiple tasks.

2. Ability to deal professionally with difficult customers.

3. Ability to process return checks, occupant letters and have them in the mailroom by 11:00 a.m. Have the special return check letters to the administrative assistant by 2 p.m. so they can be hand delivered the following workday.

4. Ability to run the SDs (Order to Discontinue Water Service), OWCs, and note individual routes by 8:30 a.m. with only 2 off in error per month.
5. Ability to process the American Payment System (APS) list and note the accounts before running the SD's by 7:15 a.m. After running the routes, go back and review each account on the list and comment the account, waive any SD fees and deposits if necessary. Also set payment arrangements if needed.

6. Ability to process the daily paperwork that the field reps bring in from the day before, notate the accounts accordingly, alphabetize and file in the SD drawers. SD drawers need to be purged on as needed basis.

7. Ability to assess charges, such as Self Turn ONs (STO), send customer letters and note accounts clearly and accurately. This paperwork is ongoing and needs to be kept current. A customer's problem file needs to be returned to the filling cabinet when it is completed.

**Billing Desk**

1. Review daily reports of daily meter read books: evaluates meter readings outside normal parameter; releases accounts for billing or generates bill preparation when problem account situations have been resolved.

2. Prepares field service orders for follow-up problem accounts; reviews and corrects records on problem accounts that have been field checked; enters account comments and data on account problems and actions taken.

3. Calculates and processes billing adjustments up to authority level; calculates and processes special billing; calculates and processes manual adjustments and credits to customer accounts; researches and posts rejected payment; initiates balance transfers to new accounts and customer refund payments.

4. Reviews account records and history; consumption and payment patterns; requests field tests of meter accuracy and usage; reviews test results and issues or recommends adjustments to customer accounts to correct errors; notifies customers of action taken and results.

5. Performs related duties as assigned