



## Customer Service Representative I/II

### DEFINITION:

Under immediate (Customer Service Representative I) to general (Customer Service Representative II) supervision, performs a variety of routine to moderate office support activities for the District, which include telephone and counter reception, word processing, data entry and organization, receipt of payments, record keeping, and filing; and provides information to the public and District staff.

### SUPERVISION RECEIVED AND EXERCISED:

Receives immediate (Customer Service Representative I) to general (Customer Service Representative II) supervision from assigned supervisory or management staff. Exercises no direct supervision over staff.

### CLASS CHARACTERISTICS:

Customer Service Representative I: This is the entry-level classification in the customer service series. Initially under close supervision, incumbents learn and perform routine administrative and office support duties. 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 Representative II 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 as they arise.

Customer Service Representative II: This is the fully qualified journey-level classification in the customer service series. Positions at this level are distinguished from the Customer Service Representative I level 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.

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

**EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only):**

*Reasonable accommodations may be made, on a case-by-case basis, to enable individuals with disabilities to perform the essential functions of the job.*

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

- Answers telephones; replies to customer inquiries; researches and investigates customer inquiries and complaints; resolves and/or refers to various departments for resolution.
- Gathers information from a variety of sources for the completion of forms, records, applications, and other documents; contacts individuals to obtain additional information as needed.
- Prepares various documents from drafts, notes, dictation, or brief instructions, which may include reports, records, forms, notices, meeting minutes.
- Performs other routine clerical support work as required, which may include but is not limited to copying documents, filing/retrieving files, processing mail, faxing information, collating documents, maintaining lists and logs, scanning/imaging/indexing documents, and ordering of supplies and forms.
- Batches and verifies payments from sewer and water customers; prepares deposits.
- Collects connection fees after verifying eligibility through the District's engineering and operations departments.
- Orders office supplies on a regular basis.
- Prepares and generates letters memoranda, and reports relating to sewer and water inspection and testing, involving new construction and/or remodel work.
- Occasionally, in the absence of the Purchasing personnel, receives merchandise for District operations; places information into accounting software; assists the Purchasing Department with quarterly inventory count.
- Schedules various inspections and appointments and any follow-up requirements for District Ordinance.
- Coordinates and schedules reservations for all District owned and operated facilities within parks; prepares calendar for Parks Department to use in staff scheduling.
- Issues Resident Stickers; checks eligibility and enters data into automated system; generates system reports.
- Prepares parking fee deposits collected from various District parks and facilities and any other monies received by rangers.
- Performs daily errands; delivers and collects materials; collects parking gate fees at various District parks and facilities.
- Performs other related duties as assigned.

**MINIMUM QUALIFICATIONS:**

*Any Combination of education and/or experience that provides the required knowledge, skills, and abilities to perform the essential functions of the position. A typical combination includes:*

**EDUCATION AND EXPERIENCE:**

Customer Service Representative I/II – Equivalent to completion of the twelfth (12<sup>th</sup>) grade, and one (1) year of basic clerical and accounting duties, cash handling, and customer service experience.

Customer Service Representative I – One (1) year of basic clerical, accounting, and customer service experience.

Customer Service Representative II – Three (3) years of progressive clerical, accounting, and customer service experience, or two (2) years as a District Customer Service Representative I with demonstrated ability and knowledge.

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

#### KNOWLEDGE OF:

- District services and operations.
- The District's service fee structure.
- Record-keeping procedures.
- District and mandated safety rules, regulations, and protocols.
- 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.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.

#### ABILITY TO:

- Perform a diverse range of administrative and clerical tasks.
- Make accurate arithmetic computations.
- Receive, process and properly handle cash payments from clients.
- Generate system reports and format for use by assigned department.
- Schedule and calendar reservations for District owned and operated facilities within parks.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Maintain a variety of filing, record-keeping, and tracking systems.
- Understand and follow oral and written instructions.
- Organize own work, set priorities, and meet critical time deadlines.
- 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.

#### LICENSES AND CERTIFICATIONS:

- Possession of a valid driver's license along with a driving record acceptable to the District and the District's insurance carrier.

#### TOOLS AND EQUIPMENT USED:

Modern office equipment such as use of personal computer, word processing, phone, calculator, copy machine, fax machine, and postage machine.

#### PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job in compliance with the

Americans with Disabilities Act (ADA) requirements. Reasonable accommodations may be made, on a case-by-case basis, 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 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 weighing up to 20 pounds.

<b>ENVIRONMENTAL CONDITIONS:</b>
----------------------------------

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.