



# Customer Service Representative I/II

Agency/Department: Administrative Services Liaison

Reports to: Administrative Services Liaison  
Supervises: N/A

## JOB SUMMARY:

Performs a variety of clerical tasks, accounting functions, and administrative work in answering phones, receiving the public, providing customer assistance, cashiering, data processing, bookkeeping, and receiving materials and goods.

## SUPERVISION RECEIVED/EXERCISED

**Customer Service Representative I** – Receives immediate supervision from the Administrative Services Liaison; and technical and functional supervision from the Customer Service Team Leader and/or Customer Service Representative II.

**Customer Service Representative II** – Receives general supervision from the Administrative Services Liaison; and technical and functional supervision from the Customer Service Team Leader.

## DISTINGUISHING CHARACTERISTICS:

**Customer Service Representative I** – This is the entry level class in the Customer Service Representative series. Positions in this class usually perform most of the duties required of the Customer Service Representative II but are not expected to function at the same skill level and usually exercise less independent direction and judgment on matters related to work procedures and methods.

**Customer Service Representative II** – This is the journey level class in the Customer Service Representative series. Positions within this class are normally filled by advancement from the Customer Service Representative I class, or filled from the outside. Customer Service Representative II requires prior experience in the clerical, accounting, and administrative functions of the Customer Service Representative I class and advanced knowledge of cashiering, data processing, bookkeeping, and receiving materials and goods. Appointment at the II level requires that the employee be performing substantially the full range of duties for the class and meet the qualification standards for the class.

All positions assigned to this class require the ability to work independently exercising judgment and initiative and the ability to train others.

## EXAMPLES OF ESSENTIAL DUTIES:

- Answer telephones; provide customer service to walk-in customers; investigate customer inquiries and complaints.
- Process and code walk-in customer payments and other related cash receipts.
- Batch and verify payments from sewer and water customers; prepare deposits.

- Perform one or more of the following daily tasks: deliver deposits to the bank; obtain and distribute District mail to the proper recipient; prepare correspondence, reports, purchase orders, and other material from copy using a Windows environment.
- Alphabetize, sort, and file material.
- Collect connection fees after verifying eligibility through the District's engineering and operations departments, working closely with related agencies.
- Inventory and order office supplies on a regular basis.
- Compose letters, memoranda, and reports relating to sewer and water inspection and testing, involving new and remodel construction.
- Administer agreements relating to operations, parks and office departments.
- Schedule appointments for Public Works Construction Inspector and follow-up requirements per District Ordinance.
- Receive merchandise for District operations. Input receiving information into accounting software. Assist Purchasing Department with quarterly inventory count.
- Complete purchase orders after receiving merchandise, enter purchase order information into inventory computer system, and forward the appropriate documentation to Accounts Payable or other departments as needed.
- Coordinate and schedule park reservations for all District managed facilities; prepare calendar for Parks Department to use in staff scheduling.
- Issue Resident Stickers; check eligibility and enter data into computer software; prepare reports.
- Assist with retrieving monies from iron rangers; prepare parking fee deposits collected from various District parks and facilities.
- Use Email to communicate with co-workers.
- Assist all departments as needed or directed.
- May assist with daily errands, US Mail and Board materials delivery, and parking gate fee collection at various District parks and facilities.
- May assist other departments on special projects.
- May serve on employee committees as assigned.
- Performs other 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:

- A. Graduation from a high school or GED equivalent and,
- B. Minimum two years' experience in the performance of basic clerical and accounting duties, cash handling, and customer service experience.
- C. Any equivalent combination of education and experience.

Customer Service Representative II: The equivalent of one year of full time experience in the level I series.

## DESIRED KNOWLEDGE, SKILLS, ABILITIES:

- Ability to perform basic clerical and accounting duties. Ability to assume responsibility, make accurate decisions and use good judgment in recognizing scope of authority. Ability to maintain cooperative working relationship with all public and District employees contacted in the performance of duties. Ability to obtain a forklift operator license. Ability to learn and use utility software.
- Knowledge of high school level mathematics, standard office procedures, and operation of general office equipment including familiarity with Microsoft Windows environment, personal computers, copiers, fax machines, etc.
- Proficiency in Microsoft Word, Excel, and Outlook. Sufficient keyboard speed and accuracy to enter and retrieve data from computer terminal efficiently.

## LICENSES:

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 AND MENTAL 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 Americans with Disabilities Act (ADA) requirements. On a case-by-case basis, reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.***

### Physical Demands

While performing the duties of this job, the employee is frequently required to sit, talk, hear, use keyboard, view monitor, and use phones. The employee will occasionally be required to lift and/or move 15-35 pounds and may need to carry for approximate distance up to 50 feet, bend, reach with hands and arms, use fingers to write or type and handle or feel, walk, carry documents, crouch, stoop, kneel, climb stairs, use of step ladder in lifting and lowering of documents. Long periods of looking at computer monitor.

Requires occasional use of office machinery such as copier, hole punch, binding machine, calculator, fax machine, postage machine, laminator, and forklift. Specific vision abilities required by this job include close vision and the ability to adjust focus.

Work Environment

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

While performing the duties of this job, the employee is occasionally exposed to dust, noise, pollens, and fumes.

**FLSA Exemption status:** Non-exempt, Classified

**Employee Unit:** General Unit

**Job Family:** Administrative Services Liaison

**Class Progression:**

- Customer Service Representative I
- Customer Service Representative II
- Customer Service Team Leader

Date of Last Revision: \_\_\_\_\_ 3/13/2007 \_\_\_\_\_

Date Approved: \_\_\_\_\_ 12/8/15 \_\_\_\_\_

Approved By: \_\_\_\_\_ Signed by Duane Whitelaw \_\_\_\_\_