**MCKINLEYVILLE COMMUNITY SERVICES DISTRICT**

**CUSTOMER SERVICE REPRESENTATIVE**

Position: Customer Service Representative

Division: Support Services

Supervisor: Customer Service Supervisor

Status: Non-Exempt (Hourly)

**DEFINITION** Under general supervision, to perform specialized, clerical, bookkeeping and data processing procedures as they relate to customer service, utility billing, accounts payable and other District needs as assigned.

**DISTINGUISHING FEATURES** Customer Service Representative is the entry level class of this series. Initially under close supervision learn to receive and process payments, and to handle customer inquiries and complaints. As experience and proficiency are gained, there is greater independence of action within established guidelines. There is a potential to advance to the Customer Service Specialist level after five years of successful experience at the CSR I level and demonstrating proficiency for performing Customer Service Specialist level work.

**TYPICAL EXAMPLES OF DUTIES**

* Attendance and Punctuality are required abilities for this position.
* Greets customers and the general public; directs customers and general public to the appropriate department staff.
* Using an on-line computer system, processes requests to begin or end water service, obtaining required information from the customer; enters name, address and other changes to create or update master customer account records and files.
* Answers customer inquiries, interprets policies and regulations, explains service fees and rate structures, researches questions or problems and follows up as required.
* Answers billing inquiries, affects payment of overdue accounts and adjusts accounts within specific guidelines.
* Receives customer payments, makes change and issues receipts; balances cash receipts and prepares deposit documents.
* Processes payments received by mail, over the counter and the drop box, including totaling batches of checks and preparing deposit slips.
* Enters customer payment and account adjustment information into the on-line computer system.
* Schedules required activity for field personnel; maintains close contact with such staff, particularly in relation to beginning water service or turning water service off for nonpayment.
* Ability to process billing and receiving meter readings when needed as backup.
* Reviews hard-copy customer account records for completeness and arithmetic accuracy; maintains customer account files and related master meter records.
* Answers phones for District administrative offices, receiving, screening and forwarding all telephone calls and visitors and referring caller to proper office or individual.
* Prepares correspondence and periodic or special reports relating to customer service activities.
* Maintains Service Order Files and filing system for billing registers and customer account information.
* Helps prepare and follow up on delinquent accounts lock list.
* Provides a wide variety of general clerical work, including typing, filing, copying, scanning and filing into DocStar.
* Ability to follow or “adhere” to all District policy and procedures.

**BASIC QUALIFICATIONS:**

**INCLUDES KNOWLEDGE OF**:

* Modern office procedures, methods, and computer equipment and software.
* Customer Service and Customer Satisfaction.
* Basic record keeping practices and procedures.
* Basic mathematics principles.
* Basic bookkeeping and financial record keeping principles and practices.
* Safe Work Practices.

**ABILITY TO:**

* Be present and on time at the specified work station each day.
* Establish and maintain effective working relationships with those contacted in the course of work including District staff and the general public.
* Provide customer service skills in supporting the District’s customers.
* Use and operate a typewriter, calculator, computer, computerized customer information system and other office equipment.
* Maintain a variety of clerical records and files.
* Perform procedures in an organized and accurate manner.
* Accurately count, record and balance assigned transactions.
* Learn and correctly apply the policies and procedures of the District.

**PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:**

* Communicate clearly and concisely, both orally and in writing.
* Hear normal conversation in person and/or on the telephone.
* Vision must be sufficient to accomplish the duties of the position, which may include operating a District vehicle.
* Sit or stand for prolonged periods of time.
* Manual dexterity must be sufficient to accomplish the duties of the position.
* Push and pull 25 pounds.
* Lift and carry 25 pounds.

**EDUCATION AND EXPERIENCE:**

* High school diploma or equivalent.
* One year of relevant customer service experience and accounting clerical experience.

**LICENSE:**

* Possession of, or ability to obtain, a valid California driver’s license. Must have a driving record acceptable to the District

I have received and read this Job Description, fully understand it, and freely agree to its terms.

Dated\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature of Employee\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Adopted and Approved

Revised February 2021