



Union Public Utility District
POLICY TITLE: JOB DESCRIPTION
CUSTOMER SERVICE REPRESENTATIVE

I/II/III

POLICY NUMBER: 2330

REPORTS TO: General Manager

Wage Schedule Range: 12/14/22

Date Revised: 4/19/2023

Classification specifications (job descriptions) are intended to present a descriptive summary of the range of duties and responsibilities performed by an incumbent in the classification. Specifications are intended to outline the minimum qualification for entry into the classification and not intended to reflect all duties and responsibilities of an incumbent in the classification.

Definition/Summary

Customer Service Representative I – Is the entry level class in the series. Under close supervision, an incumbent in this position will perform a variety of customer service duties. This includes answering customer inquiries, payment procedures, maintenance of customer account records, clerical tasks, etc.

Customer Service Representative II is responsible for performing a wide variety of customer service duties. This includes daily cash receipts, deposits, and customer account issues related to payments, customer updates, water service issues, meter reading and billing of customer accounts. This position will assist the front office in daily customer service operations, clerical tasks and other duties as assigned. The Customer Service Representative II level is distinguished from the Customer Service Representative III level by the performance of less than the full range of duties assigned to the Customer Service Representative II level.

Customer Service Representative III receives only occasional instruction or assistance as new, unusual, or unique situations arise and is fully aware of the operating procedures and policies within the work unit. An incumbent in this position will perform the full range of assigned duties which includes more difficult and complex assignments and technical and functional supervision to incumbents in class levels I, and II.

Essential Duties and Responsibilities

Other duties may be assigned.

1. Opens cash terminal at the start of the day.
2. Answers telephone and greets office visitors, providing a wide range of receptionist duties related to office procedures and meeting preparation.
3. Greet customers and visitors at the front desk in a pleasant and courteous manner and provide whatever assistance they may need.
4. Receives, and distributes daily mail.
5. Receives and processes daily cash receipts, posts payments to customer accounts, and prepares bank deposit related to District accounts.
6. Reconcile cash drawer daily at close of business.
7. Performs and resolves a variety of customer related functions regarding the establishment and maintenance of District customer billing, payment, and account related services.
8. Prepares, processes, and resolves delinquent account issues.
9. Discusses account or meter related issues with District staff as needed.
10. Prepares work orders related to District and customer water leaks and maintenance issues.

11. Assists with scheduling customer service requests regarding account services, changes, complaints, and other services.
12. Prepares, records, reviews and processes monthly meter reading and billing statements.
13. Conduct daily opening and closing office procedures.
14. Respond to phone calls, messages, and emails.
15. Answer main phone line, route calls, or take messages for internal and external customers.
16. Serve as cashier using utility billing software, receive and post all forms of payments received via mail, drop box, phone, in person, or in electronic form.
17. Check customer service email address inbox and customer service voicemail frequently and distribute or respond as appropriate.
18. Sort, open, and process customer service mail.
19. Create, track, and process Utility Service Requests (USRs).
20. Prepare and send work orders.
21. Process customer address updates.
22. File and maintain all customer service files, both hard copy and digital.
23. Assist other customer service representatives with tasks as required, including the preparation of form letters, lock-off letters, returned mail, etc.
24. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
25. Maintain customer accounts; includes processing account and leak adjustments, payments, Auto ACH, refunds, return payment items, change in services, secondary bill- to, final bills, lock-offs, restoration of service, collections, general account clean-up, etc.
26. Prepare a variety of letters, account demands, credit references, account updates, possible leaks, etc.
27. Perform other duties as assigned.

Knowledge of:

1. Geography of the District and the location of District facilities.
2. Mathematical methods, practices, and procedures of financial and statistical recordkeeping.
3. Extensive Customer Service skills, procedures, and method for communicating effectively.
4. Ability and knowledge to use Microsoft Office Suite programs for word processing and spreadsheets.
5. Receptionist and office communications and etiquette practices.

Ability to:

1. Follow oral and written direction.
2. Work with minimal supervision to accomplish task as directed.
3. Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
4. Respond to and effectively prioritize multiple phone calls and other request or interruptions.
5. Correct English usage, spelling, grammar, and punctuation.
6. Efficiently use computer and financial database programs with sufficient speed and accuracy to perform assigned work, intermediate to advanced skills in Microsoft Office programs.
7. Evaluate and respond appropriately to customer complaints.
8. Handle stressful situations and difficult customers in a calm and professional manner.
9. Plan, coordinate, prioritize and organize multiple work tasks to meet deadlines with accuracy, thoroughness, and attention to detail, sometimes with little supervision.
10. Read, understand, and carry out written and oral directions in a clear, concise, and consistent manner.

11. Use initiative and independent judgment within established procedural guidelines.
12. Use arithmetic to make basic financial calculations quickly and accurately.
13. Operate a variety of automated office machines typical of a work environment such as a multi-function printer/copier/scanner machine, fax machine, check machine, etc.
14. Establish and maintain an effective and cooperative working relationship with coworkers through knowledge of work, personal and professional conduct, teamwork, and good judgment.

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. 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 regularly required to sit. Sufficient finger/hand coordination and dexterity to operate and adjust office equipment is essential. 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. The noise level in the work environment is usually moderate. On a continuous basis sit at a desk and in meetings for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write, or use a keyboard and mouse to communicate through written means.

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any related duties, as may be required.

Education and Experience

Customer Service Representative I:

Three years of general clerical and accounting office experience, which has included one year of public contact experience. Previous fee collection experience at a utility or governmental agency is desirable.

Customer Service Representative II:

In addition to the qualifications above, the Customer Service Representative II has four (4) years of increasingly responsible clerical/customer service experience, preferably including experience in working with a water or utility billing agency and a variety of office support work. Administrative support experience that includes providing direct support to management and executive level staff and Board of Directors, preferable within a public agency.

Customer Service Representative III:

In addition to the qualifications above, the Customer Service Representative III has five (5) years of increasingly responsible office administrative or customer service experience. Experience in a municipal setting, experience with utility billing, and experience with Springbrook software are desired. Prior supervisory experience is preferred.

An Associate's degree with coursework in business administration, communication or a related field is preferable.

Certificates, Licenses, Registrations

Possession of a valid California driver's license and a continuing acceptable driving record.