

## **CUSTOMER SERVICES REPRESENTATIVE I**

### Definition:

Under general supervision, employees in this class are assigned to Customer Services duties (both telephone and over the counter), collections or billing duties and related work in each assignment.

### Distinguishing Characteristics:

This is the entry-level class in the Customer Services Representative (CSR) series. This position is distinguished from the Customer Services Representative II by the performance of the more routine tasks and duties. Since this is an entry level class, employees may have only limited work experience. They receive immediate supervision from higher level supervisory staff. This position works inside an office environment, sits for long periods; occasionally lifts and carries up to 35 pounds; frequently uses a personal computer for long periods and uses the telephone frequently. Close and far vision is required.

### Examples of Duties:

- receives inquiries from customers over the phone, in person, by mail, fax and email, or through referrals;
- collects and evaluates information from customers to determine the specific nature of their request and to process their requests;
- researches background information;
- utilizes reports;
- investigates, researches and analyzes documents, historical data, billing/account statements, and other information to answer customers inquiries, process their requests, and completes specialized transactions;
- researches discrepancies;
- advises customer of rates, rules, regulations and standards related to providing service;
- communicates information regarding outages and distribution system failures, hazards or damages;
- assists others by providing information and instructions, explaining procedures, and answering questions regarding applicable procedures and methods;
- interprets and explains rules and regulations;
- keeps abreast of new and special programs and changes within existing programs;
- attends training to stay current in technological changes;
- maintains records (files, forms, logs, reports) both hard copy and electronic;
- establishes and maintains effective work relations with those contacted in the performance of required duties;

## **CUSTOMER SERVICES REPRESENTATIVE I**

- tactfully obtains sensitive information from customers, and other agency or business representatives;
- maintains information confidentially as required;
- performs a variety of general clerical duties including data entry, file and record maintenance;
- verifies and enters into proper accounts Agency revenue, fees and miscellaneous service charges;
- reconciles payments and bills as to amount due;
- logs and processes bills for payment;
- edits billing computer runs;
- identifies and researches discrepancies;
- processes orders for initial institution of service or changes in billing;
- processes orders for discontinuing service;
- processes refund credit for closing accounts;
- reviews meter reads and computes usage;
- distributes orders for rereading meters;
- collects account balances;
- locates and collects past due accounts;
- initiates collection procedures;
- processes incoming mail and payments received by mail;
- processes returned mail and address changes;
- answers routine correspondence;
- performs customer service at counter;
- writes receipts, collects monies and validates receipt in cash register;
- prepares daily cash summary;
- balances cash drawer;
- prepares, reconciles and verifies daily business receipts for bank deposit;
- prepares bank deposits;
- prepares miscellaneous billings; sends collection past due notices;
- makes necessary adjustments;
- exercises independent judgment in action to be taken to resolve customers' request;
- provides a consistent high level of quality customer service to all customers at all times.

### Qualifications:

## **CUSTOMER SERVICES REPRESENTATIVE I**

### Knowledge of:

- modern office practices and procedures;
- correct English usage, spelling, grammar, and punctuation;
- job-related laws;
- software applications, including but not limited to Word, Excel, Access;
- common billing and basic bookkeeping practices.

### Ability to:

- operate a personal computer and other office equipment;
- maintain a variety of records and files;
- type at a speed necessary for successful job performance;
- perform varied clerical work;
- understand and carry out oral and written instructions;
- communicate clearly and concisely, both orally and in writing;
- establish and maintain cooperative working relationships with those contacted in the course of work;
- explain and interpret rules, regulations, and Agency policies.

### Education/Experience:

Sufficient education, training and experience to demonstrate the knowledge, skills and abilities listed above. These would normally be acquired by completion of high school or equivalent, one year of general, clerical experience and one year experience in public contact work, utility service or fee collection environment, preferably for a municipal government or other related industry. Additional coursework in accounting, computer operations or customer service is preferred.

### License/Certificates:

Must possess and maintain a valid California driver's license with an acceptable driving record.