



HERITAGE RANCH COMMUNITY SERVICES DISTRICT

CUSTOMER SERVICE REPRESENTATIVE I/II/III

DEFINITION

To perform a wide variety of customer service, utility billing, and clerical functions. This includes, but is not limited to: acts as receptionist answering phones; pick-up and processing mail; interacts frequently with the public daily, answer utility bill questions and public information requests; prepares utility billing; billing adjustments; process service orders; process door hangers and lock offs; assists in the monitoring of delinquent accounts; process utility bill payments. Perform administrative duties as needed including: the preparation of Board of Director packets; correspondence; prepares files; keeps accurate files and records and maintains them in a retrievable order; copying; sorting; and other duties as assigned. Works within established guidelines and procedures.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from the Office Supervisor. Exercises no supervision of staff.

CLASS CHARACTERISTICS

Customer Service Representative I: This is the entry-level class in the customer service representative series. This class performs the more routine tasks and duties assigned to positions within the series including filing, copying, and receptionist duties.

Customer Service Representative II: Employees within this class are distinguished from the Customer Service Representative I by the performance of the full range of duties as assigned including typing, filing, research, data entry assignments, and utility billing.

Customer Service Representative III: Employees within this class are distinguished from the Customer Service Representative II by the performance of the most complex duties assigned. Employees at this level are knowledgeable in utility billing, account adjustments, computer programs and computer equipment. Employees at this level are expected to work independently in performing the full range of duties with limited supervision.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Provide exemplary customer service to all individuals by demonstrating a willingness to be attentive, understanding and responsive, fair, courteous and respectful, and to actively participate in maintaining a positive customer service environment.
- Act as a receptionist; answer the telephone and assist the general public; take and distribute messages for department staff; provide information on District policies and procedures, as required.

- Perform a variety of routine recordkeeping duties including setting up and maintaining filing and records in a retrievable manner and purges files as required under the District's Records Keeping Policy.
- Prepares utility billing.
- Processes utility bills, fees and/or adjustments. Assists in the monitoring of delinquent accounts.
- Enter and update data into computer terminal; type a wide variety of documents and forms; retrieve data; operate a printer and other computer peripherals.
- Provide assistance to the public including providing information and forms; and making and distributing copies, as necessary.
- Operate a variety of office machines including a telephone switchboard, photocopier, typewriter, and computer terminal.
- Participate in distributing office supplies; check and log materials and supplies requisitioned and received.
- Picks up, processes and distributes the mail including receiving, sorting and distributing incoming and outgoing correspondence.
- Participate in a variety of special projects, as assigned.
- Perform related duties and responsibilities, as assigned.
- May serve as an assistant to the Board Clerk.

QUALIFICATIONS

Knowledge of:

Customer Service Representative I:

- Modern office procedures, methods and computer applications (Microsoft Outlook, Word, Excel, and PowerPoint).
- Principles and practices of filing.
- English usage, spelling, grammar and punctuation.
- Basic arithmetic. Basic accounting methods are desirable.
- Ability to operate adding and calculating machines.

Customer Service Representative II: (In addition to Customer Service Representative I)

- Principles and practices of filing and record keeping.
- Arithmetic and accounting principles.
- Basic report preparation techniques.
- May prepare meeting agendas and minutes for departmental and/or specified committee meetings.
- Reviews District and financial-related policies, rates and fees with customers.
- Checks and tabulates standard arithmetic or statistical data; may summarize such information and prepare periodic numerical reports.

Customer Service Representative III: (In addition to Customer Service Representative II)

- Arithmetic, bookkeeping principles, and accounting programs.
- Business letter writing and report preparation techniques.
- Proofreads materials for accuracy, completeness, compliance with departmental policies, formatting, and correct English usage including grammar, punctuation, and spelling.
- Oversees the purging of files per District policies.

Ability to:

- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Learn to correctly interpret and apply District policies and procedures.
- Perform general clerical work including maintaining files and compiling information for reports.
- Act as a receptionist in operating a multiple-line telephone system.
- Type and enter data into the computer at a speed necessary for successful job performance.
- Operate standard office machines including a computer.
- Understand and follow oral and written instructions.
- Communicate clearly and concisely, both orally and in writing.
- Proactive approach to problem solving.
- Maintain physical condition appropriate to the performance of assigned duties and responsibilities which may include the following:
 - Sitting for extended periods of time
 - Operating assigned equipment
- Maintain effective audio-visual discrimination and perception needed for:
 - Making observations
 - Communicating with others
 - Reading and writing
 - Operating assigned equipment

Education and Experience:

Any combination of education, training, and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education:

Customer Service Representative I: Equivalent to the completion of the twelfth grade. Knowledge of modern office procedures, methods, and computers. Knowledge of Microsoft Office, Word, Excel and PowerPoint is desirable.

Customer Service Representative II: Equivalent to the completion of the twelfth grade. Knowledge of modern office procedures, methods, and computers. Knowledge of Microsoft Office, Word, Excel and PowerPoint. Additional specialized clerical training, secretarial experience, accounting, and/or computer training is desirable.

Customer Service Representative III: Equivalent to the completion of the twelfth grade and completion of 30 college units with an emphasis in accounting or a related field. Knowledge of modern office procedures, methods, and computers. Knowledge of Microsoft Office, Word, Excel and PowerPoint. Additional specialized clerical training, secretarial experience, accounting, and/or computer training is desirable.

Experience:

Customer Service Representative I: One year of clerical experience including public contact.

Customer Service Representative II: Two years of general clerical or bookkeeping experience including experience working with the public.

Customer Service Representative III: Four years of increasing responsible clerical, accounting, or bookkeeping experience including experience working with the public.

Licenses and Certifications:

Possession of a valid and appropriate California Driver License. Must have and maintain a satisfactory driving record and be insurable to operate District vehicles.

PHYSICAL DEMANDS

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, before groups, 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, typewriter 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 up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, and the public in providing customer service, explaining District policies and procedures, and requesting and providing information.

EFFECTIVE: October 2017

DEPARTMENT: Administration

FLSA: Non-Exempt