



DECEMBER 2022

FLSA: NON-EXEMPT

CUSTOMER SERVICE REPRESENTATIVE

DEFINITION

Under direct supervision, provides customer service to City constituents, performs a variety of routine to complex technical and administrative support duties in the preparation, maintenance, and processing of accounting and customer account records for the City, in addition to balancing, reconciling and maintaining accounting and financial records; prepares correspondence using independent judgment in content and style; interacts frequently with the public and explains City policies and procedures and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from the Finance Director or designee. Exercises no direct supervision over staff.

CLASS CHARACTERISTICS

Customer Service Representative I - This is the entry-level class in the CSR series. Initially, under close supervision, incumbents with basic clerical experience learn to perform routine to moderately complex customer service and administrative support duties, including document preparation, records management, researching, compiling, and organizing information from various sources, screening phone calls, visitors, mail, directing questions to the appropriate staff, and customer account functions. As more experience is gained, assignments become more varied and are performed with greater independence. Positions at this level usually perform most of the duties required of the positions at the II class, but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. Since this class is often used as a training class, employees may have only limited or no directly related work experience. Must have the ability to properly communicate with customers and provide exceptional customer service.

Customer Service Representative II - This is the full journey-level class in the CSR series. Incumbents are capable of performing the full range of complex customer service and administrative support duties, including document preparation, records management, researching, compiling, and organizing information from various sources, screening phone calls, visitors, mail, directing questions to the appropriate staff, and customer account functions. Positions at this level are distinguished from the I level by the performance of the full range of duties as assigned, working independently and exercising judgement and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. They exercise a higher level of discretion and independent decision-making and provides technical and functional direction to class I CSR staff.

EXAMPLES OF ESSENTIAL 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.

- Receives payments and fees from the public and/or other departments and processes payments at customer service locations; makes change as necessary and maintains cash drawer as appropriate; processes automatic customer account debits through electronic bank transfers; balances payments and posts transactions in the accounting system daily.
- Post information to departmental, fiscal or other records; collects and submits data for reports pertaining to assigned functions.
- Sets up new accounts or closes out terminated accounts; enters meter readings for monthly billing; notifies customers of excessive usage and initiates work orders to investigate for high consumption, potential leaks, or broken utility meters; calculates and processes billing adjustments due to leaks, penalty adjustments, or overestimating; enters new meters into utility inventory system, and performs other various customer account activities.
- Sends out late and final notices, collection notices, and performs necessary collections and delinquency processing.
- Performs a variety of routine to complex administrative and technical account support duties related to utility billing, citations, revenue, collections and other customer related payments, including posting, balancing, reconciling, and maintaining account and financial records according to established policies and procedures.
- Verifies, posts, and records a variety of financial transactions; prepares and maintains database, records, and a variety of periodic and special financial, accounting and statistical reports.
- Maintains a variety of ledgers, registers, and journals according to established account policies and procedures; reconciles transactions and data as directed; records changes and resolves differences; maintains the accuracy of accounting and financial records.
- Generates and assists in the preparation of monthly, quarterly, and year-end financial, summary and technical reports.
- Researches records within areas of responsibility to prepare and provide follow-up information to customer and staff inquiries.
- Performs general office support duties such as opening and routing mail and deliveries; preparing correspondence; filing and record keeping; and duplicating and distributing various written materials.
- Operates a variety of standard office equipment, including job-related computer hardware and software applications, copiers, postage meters, scanners, facsimile machines, and multi-line telephones; may operate other department-specific equipment.
- Assists customers, departments, and employees by providing answers and information regarding specific account information, discrepancies and/or general accounting procedures; researches issues regarding specific transactions; and updates related files and departments on action items.
- May provide direction and training to lower-level or less experienced staff in area of assignment.
- Performs duties of disaster worker in event of an emergency.
- Performs other related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Terminology and practices of financial and account document processing and record keeping, related to utility billing.
- Business arithmetic and basic financial and statistical techniques.
- Record-keeping principles and procedures.
- Standard office practices, methods, and computer equipment.

- Computer applications related to work, including word processing spreadsheet, customer billing software and cash handling.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors and City staff.

Ability to:

- Provide exceptional customer service including greeting customers, communicating with customer and resolving issues with unsatisfied customers.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Interpret, apply, and explain policies and procedures.
- Compose correspondence and reports independently or from brief instructions.
- Make accurate arithmetic, financial, and statistical computations
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Understand and follow oral and written instructions.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate and learn how to operate computer equipment and specialized software applications.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and harmonious working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills and abilities is qualifying.

Customer Service Representative I - Graduation from high school or possession of a high school equivalency and one (1) year of varied customer service and administrative support experience.

Customer Service Representative II - In addition to the above, specialized training in business or customer accounts and three (3) years of increasingly responsible administrative support experience, or two (2) years of experience equivalent to the Customer Service Representative I at the City of Coachella. An associates degree from an accredited college or university can be substituted for (1) year of experience and a bachelor degree for (2) years of experience.

Licenses and Certifications:

Valid California class C driver's license with satisfactory driving record and automobile insurance.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, be able to operate a motor vehicle to visit various City and meeting sites, possess adequate vision to read printed materials and a computer screen and possess sufficient hearing and speech to communicate in person, before groups, and over the telephone. This position includes sedentary activities but standing in work areas and walking between work areas will be required. Finger dexterity is needed to access, enter and retrieve data using a computer 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 weighing 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. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

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