

PADRE DAM MUNICIPAL WATER DISTRICT CLASS SPECIFICATION

CLASS TITLE: Customer Service Representative

DEPARTMENT: Finance	ACCOUNTABLE TO: Customer Service Manager	FLSA Status: Non-Exempt
SALARY RANGE:	11, 13, 15	
<p>CLASS SUMMARY: Incumbents function as the first line of exposure to Padre Dam customers and the general public. They are responsible for quality customer service by assisting internal as well as external customers. Duties might include: utilizing Padre Dam’s computer billing system to calculate and produce water/recycled/ wastewater billing statements; creating queries for statistical reporting; uploading and downloading files to produce and/or process automatic bank payment transfers, informational packets and billing data transfers; directly troubleshooting customer challenges by researching and resolving problems; explaining and enforcing Padre Dam policy and regulations; preparing a variety of correspondence and documents; processing first-line customer appeals and adjustments; receiving and posting payments; preparing and balancing daily deposits, monthly receivables and quarterly capacity fee liability accounts; receiving and distributing incoming and outgoing mail; implementing Padre Dam security procedures relating to visits with the Administration building; and other duties as may be required.</p>		
<p>DISTINGUISHING CHARACTERISTICS: The Customer Service Representative is a wide range within the two level customer service series. The range goes from the entry-level, reception representative to the fully trained representative who is capable of performing the more complex functions of the position. The Customer Service Representative is distinguished from the Customer Service Manager in that the Manager has full supervisory authority. All positions have significant contact with the general public.</p>		

DUTY NO.	ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)
1.	Assists customers either by phone, in person, by mail or e-mail regarding questions and problems on leaks, transfers, policies, procedures, services and bills. Researches and resolves related problems. Explains and enforces Padre Dam policy and procedures.
2.	Answers phones, greets visitors, handles pick-ups and deliveries, directs inquiries to appropriate locations, transacts all Administration Building payments through cash register.
3.	Performs billing activities which include: performing data entry, running customer computer programs, reviewing reports, researching and correcting consumptions; contacting customers; calculating and reviewing charges; preparing and sending electronic file for bill creation; and resolving related billing problems.
4.	Collects receivables and deposits by processing incoming checks; performing data entry, running computer programs for bank payment transfers; depositing and returning payments; performing lien and tax assessment procedures; balancing daily sales with receipts; balancing monthly billing receivables and deposits and balancing quarterly capacity/installation liability accounts.
5.	Processes incoming, outgoing and interoffice mail; prepares and runs computer programs to create, print and mail informational packets.
6.	Prepares a variety of forms and documents such as correspondence, notices, schedules, service information and reports using word processing, spreadsheets and custom software; maintains files and/or records.
7.	Processes documents and forms by running computer programs and/or custom software, ensuring complete and accurate information is provided.
8.	Inventories and orders form supplies; prepares purchase orders and receiving documents and processes for payments.

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9.	Determines, creates and maintains department calendar in relation to workload assignments, personnel schedule and department coverage. Provides training when appropriate.
10.	Reviews, researches and responds to formally appealed charges using judgment to determine appropriate level of adjustment.
11.	Receives, reviews for accuracy and processes all capacity payment receipts and service orders.
12.	Performs other duties of a similar nature or level.

Knowledge (position requirements at entry):

- Customer service techniques;
- Basic knowledge of practices and techniques such as billing and interpersonal skills;
- Basic computer skills and programs such as word processing, spreadsheet programs, internet use;
- Grammatically correct verbal and written English skills so as to communicate information in a positive and professional manner.

Skills (position requirements at entry):

- Using diplomacy, tact and firmness in dealing with the public;
- Making reasonable deductions and judgments to resolve customer issues and perform job related duties;
- Maintaining files and records;
- Performing intermediate mathematical calculations;
- Using office equipment such as phones, computers, calculators, copiers and fax machines;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction in a positive manner.

Training and Experience (position requirements at entry):

High School Diploma or General Equivalency Diploma (G.E.D.) and one year experience working in an office setting with considerable customer contact and six months or more data entry experience; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Licensing Requirements (position requirements at entry):

- Valid California Driver's License.

Physical Requirements:

Positions in this class typically require: sitting, standing, lifting, pulling, pushing, walking, fingering, grasping, talking, hearing, seeing and repetitive motions.

Medium Work: Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.

Classification History:

Date: 4/98; 1/02; 1/05; 1/07