SOUTH COAST WATER DISTRICT

CUSTOMER SERVICE TECHNICIAN I/II

DEFINITION

Under general supervision, performs a variety of responsible customer support and billing duties related to the establishment and maintenance of customer accounts for water and wastewater services; provides direct customer service associated with utility payments, requests for service, responding to complaints and providing information; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Customer Service Manager. No supervision of staff is exercised. May exercise technical and functional direction over a lower-level class.

CLASS CHARACTERISTICS

Customer Service Technician I: This is the entry-level within the customer service technician series. The principal function of this class is to provide basic administrative support and customer service within the District. Initially under close supervision, incumbents of this class perform a variety of routine reception, billing and customer service work that does not require previous specialized experience. As knowledge and experience are gained, the work becomes broader in scope, assignments are more varied and are performed under more general supervision. This class is alternately staffed with the Customer Service Technician II and incumbents may advance to the higher-level class after gaining the knowledge, skills and experience that meet the qualifications for and demonstrating the ability to perform the work of the higher-level class.

Customer Service Technician II: This is the journey-level within the customer service technician series. Incumbents are expected to perform the full range of customer service duties and are required to work independently and use sound judgment. The work requires application and interpretation of policies, procedures, and regulations and involves frequent contact with the public. This class is distinguished from Customer Service Manager in that the latter has the overall management responsibility for all customer service, billing, and field service functions for the District and for developing, implementing, and interpreting public policy.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS

Duties may include, but are not limited to, the following:

- Responds to customer inquiries and complaints in person or by telephone and provides information; provides for the resolution of unusual billing and customer cost situations by conducting appropriate research; and represents the District to callers and visitors in a professional and customer friendly manner.
- Receives and screens visitors and telephone calls; takes messages, directs the caller to the proper office or person, and/or provides factual information or problem resolution regarding District and departmental activities and functions that requires the application and explanation of rules, policies, and procedures.
- Interprets policies and procedures and explains service fees, rates, and procedures to customers; may waive fees under appropriate circumstances and with supervisory approval.
- Receives and processes service requests and transfer orders, sets up new accounts, determines and collects necessary charges.
- Responds to customer inquiries regarding water use efficiency.
- Operates computer billing systems; edits, prepares, and sends bills; maintains and reconciles a variety of customer billing records as directed.
Receives customer payments in person, via District website, or by mail; makes change and issues receipts; balances cash receipts, processes mail payments, develops totals, prepares deposit documents and end-of-day reports, and delivers daily bank deposits.

- Resolves issues and problems regarding the processing of orders and delinquent accounts.
- Prepares correspondence relating to customer service activities.
- Assists in the preparation of special reports related to customer billing.
- Operates standard office equipment, including job-related computer hardware and software applications, facsimile equipment and multi-line telephones; and may operate a two-way radio.
- Performs project research and report preparation, technical reports and other technical work related to District activities.
- Drafts and types correspondence, reports, forms, invitations, graphic materials, and specialized documents; and proofs materials for accuracy, completeness, compliance with District policies, format and English usage, including grammar, punctuation, and spelling.
- Performs related duties as assigned.

**QUALIFICATIONS**

Knowledge of:

- Practices and procedures related to accounting for receipts and the maintenance of customer accounts.
- Basic water mathematics.
- Codes, regulations, policies, and procedures related to the customer service department.
- Business arithmetic and basic statistical techniques.
- Basic business letter writing and the standard format for reports and correspondence.
- Record keeping principles and procedures.
- Standard office support practices and procedures, including the use of standard office equipment.
- Computer applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for dealing effectively with the public, vendors, contractors and District staff, in person and over the telephone.
- Techniques for providing a high level of customer service to public and District staff, in person and over the telephone.

Ability to:

- Deal tactfully with the public and others in providing information, answering questions, and providing customer service.
- Respond to and effectively prioritize multiple phone calls and other requests or interruptions.
- Compose correspondence independently or from brief instructions.
- Balance cash receipts and maintain accurate financial records.
- Make accurate arithmetic, financial, and statistical computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Interpret and implement policies, procedures, and technical processes.
- Maintain detailed and accurate records.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- 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 and maintain effective working relationships with those contacted in the course of the work.

**EXPERIENCE AND TRAINING GUIDELINES**
Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

**Experience:**

**Customer Service Technician I:** One (1) year of experience in customer service, maintaining financial and accounting records, and/or office support. College coursework or other specialized training in accounting or related field is desirable.

**Customer Service Technician II:** Two (2) years of experience in customer service, maintaining financial and accounting records, and/or office support. College coursework or other specialized training in accounting or related field is desirable.

**Training:**

**Customer Service Technician I/II:** Equivalent to the completion of the twelfth (12th) grade.

**License or Certificate:**

**Customer Service Technician I/II:**

- Valid California class C driver’s license with satisfactory driving record.

**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. 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 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 potentially hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

*The specific statements shown in each section of this classification description are not intended to be all-inclusive. They represent the essential functions and minimum qualifications necessary to successfully perform the assigned functions. 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.*