

CUSTOMER SERVICE REPRESENTATIVE I CUSTOMER SERVICE REPRESENTATIVE II

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

SUMMARY DESCRIPTION

Under general supervision, provides a variety of routine to difficult financial, statistical and accounting office support for general accounting, billing and cashiering functions; provides information and assistance to customers, the general public, and other City staff and departments; maintains files and records; and performs general office support duties, including typing and recordkeeping.

DISTINGUISHING CHARACTERISTICS

Customer Service Representative I – This is the entry level class in the Customer Service Representative series. Initially under close supervision, incumbents learn office and City procedures, such as accounts receivable and payable, business licensing procedures, and cashiering functions. As experience is gained, there is greater independence of action within established guidelines. Advancement to the “II” level is based on demonstrated proficiency in performing the assigned functions that meets the qualifications for the higher level class and is at the discretion of higher level supervisory or management staff.

Customer Service Representative II – This is the journey level class in the Customer Service Representative. Employees within this class are distinguished from the Customer Service Representative I by the performance of the full range of duties as assigned including financial, billing and cashiering and accounting office support duties. Employees 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. Positions in this class series are flexibly staffed and are generally filled by advancement from the “I” level, or when filled from the outside, require prior experience. Advancement to the “II” level is based on management judgment and/or certification or testing that validates the performance of the full range of job duties.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

1. Perform a variety of responsible customer service, clerical accounting, and office support duties in support of assigned function or program area including in the areas of general accounting, utility billing, and cashiering.
2. Respond to inquiries, requests, and complaints in person or by phone; provide explanation of established procedures and policies of the work unit and/or designated program area; refer customers to appropriate personnel as necessary; start and stop services; solve customer issues and answer customer questions including billing questions.
3. Prepare, maintain, and/or verify a variety of accounting, financial, and statistical records, ledgers, logs, and files including customer account information files; review information for accuracy and completeness; resolve discrepancies and arrange for needed corrections; forward information to appropriate departments.

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4. Create new utility customer accounts; obtain required information from customers to begin or discontinue water service; verify existing credit history information; receive customer payments and guaranteed deposits for service; issue receipts as necessary.
5. Process all monies received for the City whether by cash, check or bankcard; collect fees and other monies for various City services, issuing receipts, preparing deposits, and balancing accounts on a regular basis; extend payments for overdue bills within specified limits.
6. Create, print, process, and file service orders including shut off service orders for failed arrangement.
7. Disburse and maintain petty cash records.
8. Provide a variety of assistance to customers at the City animal shelter; issue dog license certificates, microchips, adoptions and redemptions; receive and record complaints and bite reports.
9. Ensure proper authorization and compliance with City policies and procedures.
10. Perform a variety of general office support duties such as typing, proofreading, filing, answering the telephone and preparing periodic and special reports.
11. Perform related duties as required.

QUALIFICATIONS

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

- Basic principles, procedures, and methods used in the performance of customer service and clerical accounting duties.
- Customer service techniques, practices, and principles.
- Financial recordkeeping and bookkeeping practices and procedures.
- Basic auditing principles and practices.
- Basic mathematical principles.
- Methods and techniques of proper phone etiquette.
- Principles and procedures of record keeping and filing.
- English usage, spelling, grammar and punctuation.
- Business letter writing and basic report preparation.
- Modern office procedures, methods, and equipment including computers.
- Computer applications such as word processing, spreadsheet, and database applications as well as financial and statistical software.
- Pertinent federal, state, and local laws, codes, and regulations.

Ability to:

- Perform a variety of customer services, clerical accounting, and office support duties and activities in support of assigned function.
- Prepare, maintain, and reconcile various financial, accounting, statistical and numerical records.
- Perform a variety of accounting, fiscal, and statistical record keeping duties
- Make accurate arithmetic calculations.
- Perform ten-key operations by touch.

- Understand and apply pertinent laws, codes, and regulations as well as organization and unit rules, policies, and procedures with good judgment.
- Implement and maintain filing systems.
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
- Maintain composure and exercise good judgment when answering demanding questions.
- Utilize public relations techniques in responding to inquiries and complaints.
- Prioritize work and coordinate several activities.
- Understand and carry out oral and written directions.
- Type and enter data at a speed necessary for successful job performance.
- Operate and use modern office equipment including a computer and various software packages.
- Adapt to changing technologies and learn functionality of new equipment and systems.
- Use applicable office terminology, forms, documents, and procedures in the course of the work.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Education and Experience Guidelines

Customer Service Representative I

Education/Training:

Equivalent to completion of the twelfth grade.

Experience:

One year of customer service, bookkeeping, accounting or financial clerical experience.

Customer Service Representative II

Education/Training:

Equivalent to the completion of the twelfth grade. Additional specialized training or college level course work in accounting, bookkeeping, business administration, or a related field is highly desirable.

Experience:

Two years experience comparable to that of a Customer Service Representative I in the City of Antioch.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment: Work is performed primarily in a standard office setting.

Physical: Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

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FLSA: Non-Exempt

Revised January 1993; November 2000; June 2014

This class specification identifies the essential functions typically assigned to positions in this class. Other duties not described may be assigned to employees in order to meet changing business needs or staffing levels but will be reasonably related to an employee's position and qualifications. Other duties outside of an individual's skill level may also be assigned on a short term basis in order to provide job enrichment opportunities or to address emergency situations.