



## San Juan Water District

9935 Auburn-Folsom Road  
Granite Bay, California 95746  
(916) 791-0115  
www.sjwd.org

# Customer Service Representative II Position Description

**Status:** Non-Exempt  
**Supervisor:** Customer Service Manager  
**Effective Date:** December 1, 2013

### **Distinguishing Characteristics**

To provide customer service and assistance to the public; to respond to inquiries and complaints from customers and the general public; to receive and process payments and fees; to process new connection and permit applications; to perform utility billing functions, to perform a variety of clerical tasks relative to assigned area of responsibility with minimal supervision and instruction. Positions in this class are normally filled by advancement from the Customer Service Representative I position. Individuals may advance to the Customer Service Representative III level after gaining one or more years of experience, completing job-related training courses, and demonstrating on the job performance, proficiency and competency.

### **Supervision Received and Exercised**

Receives general supervision from the Customer Service Manager and receives technical and functional assistance from the Customer Service Representative III. Does not provide supervision to others.

### **Essential Duties** - *Duties may include, but are not limited to, the following:*

- Provide customer service to customers and the general public in person and over the phone; respond to inquiries and complaints regarding utility services, rate structures, billing, payments, hydrant permits, service orders and new connections.
- Receive, process and document customer utility payments, fees and rebate reimbursements from partnering agencies. Payments and fees may be received by mail, phone, in person, and electronically.
- Reconcile and maintain cash drawer daily.
- Record payments and revenue monthly into a cash receipts journal.
- Coordinate monthly meter readings with meter reading staff. Review reads for accuracy and obtain re-reads prior to billing.
- Prepare high usage reports for follow-up by Conservation staff.
- Prepare, generate and update utility bills and delinquent notices.
- Direct and coordinate delivery of door hanger notices and shut-offs for non-payment.
- Prepare and process monthly billing for capital improvement fee payment plans.

- Establish and maintain customer accounts; monitor and ensure the accuracy of account information on a continuing basis; process requests for the start and/or cancellation of service.
- Respond to questions from customers on rates and billing practices, District policies, and water efficiency measures.
- Notify customers regarding delinquent accounts, non-payments, and returned checks; apply late fees and penalties to customer accounts; evaluate customer requests for payment arrangements and follow up on payment arrangements.
- Research and investigate billing and payment inquiries; analyze water use patterns; follow up with customers and apply billing adjustments as appropriate.
- Respond to, document, and assist in resolving water-related complaints.
- Prepare, track and assign work orders related to water leaks, main and service line breaks, intract leaks, water quality, pressure, meter and register replacement, services requiring time and material tracking, and delivery of notices.
- Prepare Will Serve letters and applications and assign meters. Assist applicants with application process and respond to related inquiries.
- Prepare hydrant use permits by meter and load count and invoicing for construction water. Coordinate hydrant use with Field personnel. Maintain log of hydrant permits and water usage.
- Attend and participate in various meetings, seminars and training courses as assigned.
- Establish and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer service.
- Maintain, operate, and activate District's emergency notification system
- Perform related duties as assigned.

### **Minimum Qualifications**

#### *Knowledge of:*

- Advanced principles and practices of effective customer service.
- Methods and techniques of cash handling and reconciliation.
- Mathematical and general accounting principles
- English usage, grammar, spelling and punctuation.
- Modern office methods, procedures and computer equipment, including Microsoft Office programs.
- District's customer information software application.
- Departmental and District policies and operating procedures; pertinent Federal, State and local code, laws and regulations.

#### *Ability to:*

- Review documents related to department operations; observe, identify and problem solve office operations and procedures; understand, interpret and explain department policies and procedures; explain operations and problem solve office issues for the public and with staff.
- Perform complex duties related to the District's customer service functions.
- Understand the organization and operation of the Customer Service department.
- Meet and assist the public effectively.
- Organize and prioritize work activities.
- Interpret and apply administrative, departmental and District policies.
- Compile and maintain records and files.
- Perform accurate mathematical calculations.
- Efficiently operate computers and applicable software and 10 key.
- Initiate and maintain effective safety practices.

- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

*Education, Experience, Licenses and Certifications:*

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

Required:

- High school diploma or equivalent
- Two semesters of college level accounting courses.
- One to two (1-2) years of responsible experience equivalent to Customer Service Representative I or Account Representative I with San Juan Water District.
- Possession of, or the ability to obtain and maintain, a California Driver's License with proof of a satisfactory driving record. Individuals who do not meet this requirement due to a physical disability will be considered on a case-by-case basis.

Desirable:

Any combination of education and experience which would likely provide the desired knowledge and abilities is acceptable. A typical way to obtain the knowledge and abilities would be:

- One to two (1-2) years of business or customer service support experience with a public agency, preferably in a municipal water district, is desirable.
- One to two (1-2) years of college level coursework in accounting, computer operations or customer service is desirable.

**Physical Capabilities:**

The physical demands described here 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 functions.

<i>Physical Requirements</i>	<i>Rarely (0-12%)</i>	<i>Occasionally (12-33%)</i>	<i>Frequently (34-66%)</i>	<i>Regularly (67-100%)</i>
Seeing				√
Hearing				√
Standing/Walking		√		
Climbing/Stooping/Kneeling		√		
Lifting/Pulling/Pushing		√		
Sitting				√
Approximate Maximum Weight to Lift	50 Pounds	20 Pounds		
Fingering/Grasping/Feeling				√
Describe Working Conditions	100 Percent Indoors; frequently sit at a desk for long periods of time; frequently twist to reach equipment and perform simple grasping and fine manipulation to write and use keyboard and other office equipment.			