**DEFINITION**
Under supervision from the Customer Service Supervisor, performs varied and responsible clerical and record keeping duties involved in servicing customer accounts; serves as front-line customer support processing customer requests for service, receiving payments, and addressing customer inquiries and complaints; and performs other related work as required.

**DISTINGUISHING CHARACTERISTICS**
The Customer Account Representative classifications are distinguished from general office support classes in that responsibilities relate specifically to the maintenance of customer accounts, from application for water service to receipt of payments.

**Customer Account Representative I** is the entry level class in the Customer Account Representative series. Under close to general supervision within a framework of established policies and procedures, incumbents initially perform basic clerical duties while learning to receive and process payments and handle customer inquiries and complaints. As experience and proficiency are gained, assignments become more varied and complex and the level of independent action increases within established guidelines. Assignments are given in specific terms and are subject to frequent review while in progress and upon completion, except where tasks are well defined by established standards, policies and procedures. There is limited latitude for independent judgment.

This class is distinguished from the journey-level Customer Account Representative II class by the routine nature and limited complexity of work assignments and the level of supervision received. The Customer Account Representative I and II classifications are flexibly staffed. Incumbents in this classification normally advance to a Customer Account Representative II after two (2) years at entry level and demonstrated proficiency in the job requirements of the journey level classification.

**Customer Account Representative II** is the journey level class in the Customer Account Representative series. Under general supervision within a framework of established policies and procedures, incumbents are fully competent to exercise judgment in interpreting and explaining policies and procedures and in determining appropriate actions required to address more complex customer inquiries and problems. Assignments are given in general terms and are subject to periodic review while in progress and upon completion. There is some latitude for independent judgment and action in well-defined areas of work.

This class is distinguished from the entry-level Customer Account Representative I class by the increased complexity of work assignments and level of independence with which assignments are performed. This class is distinguished from the senior-level Customer Account Representative III class which provides training and lead direction to Customer Service personnel and resolves more difficult and complex customer service problems.
TYPICAL DUTIES
TYPICAL EXAMPLES OF DUTIES MAY INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING:

- Obtains required customer information to process requests for start or discontinuance of water services; establishes deposit amounts from written guidelines for new customers and prorates and adjusts billings as appropriate.

- Interprets policies and procedures and exercises judgment to respond to routine customer inquiries and complaints pertinent to billing, fees, rate structures and District services; researches questions or problems and follows up as required or refers to appropriate personnel for resolution.

- Receives customer payments, makes change and issues receipts; opens and verifies customer payments received by mail; balances daily cash receipts, totals batches of checks received and prepares bank deposit documents.

- Uses an on-line computer system extensively to process customer service requests; to post payments; to create or update master customer account files and related meter records; and to create work orders for field personnel.

- Schedules and coordinates activities of field personnel relative to new water service and/or turn-off of service due to non-payment; and reads tract maps and researches records to locate properties to assist field personnel.

- Issues hydrant meters for temporary water service and processes payments, enters readings, bills for damages and refunds depositions.

- Reviews a variety of customer account records for completeness and arithmetic accuracy; makes necessary corrections or refers to appropriate personnel for further action.

- Prepares correspondence and scheduled and/or special reports related to customer service activities.

- Serves as receptionist for District administrative offices, receiving and screening all telephone calls and visitors and referring caller to proper office or individual.

- Performs other related work as required.

REQUIREMENTS
Any combination of education and experience that would likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be the equivalent of:

Education and Experience:
High school diploma or its equivalent; and

Customer Account Representative I: One (1) year of general office support work in which major duties included interpreting and explaining policies and procedures to the public.
Customer Account Representative II: Two (2) years of experience in a position equivalent to a Customer Account Representative I with the District

Knowledge, Skills and Abilities:
Knowledge of: standard office practices and procedures, including record keeping principles and procedures; effective operation of a personal computer and other standard office equipment; proper written and spoken English, including spelling, punctuation and grammar; basic business arithmetic; effective and appropriate public contact and telephone techniques.

Skill and Ability to: quickly learn and apply policies, rules, regulations and procedures to a variety of work-related situations; balance cash receipts and maintain accurate financial records and files; make accurate arithmetic calculations; understand and carrying out written and oral instructions; perform detailed clerical work with accuracy; maintain attention to detail in a work environment of frequent interruptions; organize and prioritize work activities and meet established deadlines; enter data into an on-line computer system and type correspondence and forms with speed and accuracy; communicate effectively both orally and in writing; establish and maintain effective working relationships with those contacted in the course of the work; and perform essential duties of the job without causing harm to self or others.

Customer Account Representative II: (in addition to above)
Knowledge of: practices and procedures related to accounting for receipts and the maintenance of customer accounts; basic business data processing principles related to customer account record keeping.

Skill and Ability to: work independently and make sound judgments within procedural guidelines; research information and solve customer accounting problems; deal tactfully and effectively with customers, occasionally in situations where relations may be strained; prioritize work and coordinate several activities simultaneously; establish and maintain effective working relationships with those contacted in the course of the work; and perform the essential functions of the job without causing harm to self or others

Working Conditions/Physical Requirements:
The essential functions of these classifications are performed in a controlled-temperature office in a dynamic environment requiring attention to detail while interacting with the public in person and on the phone and requires the ability to: sit for extended periods of time in front of a computer screen; intermittently twist to reach equipment or supplies surrounding desk; use finger dexterity and hand strength to perform simple grasping and fine manipulation; operate a computer and other office equipment on a daily basis; speak and hear in person and on the phone; see sufficiently to perform assignments; and frequently lift and/or carry items weighing up to 20 pounds and occasionally up to 55 pounds.

Revised: 07/12

Approved: [Signature]
Human Resources/Risk Manager