

**RANCHO CALIFORNIA WATER DISTRICT
POSITION DESCRIPTION**

DATE: August 25, 2022

POSITION TITLE: **CUSTOMER SERVICE REPRESENTATIVE I / II
– OFFICE / FIELD**

GRADE LEVEL: E15 / E21

SUPERVISOR TITLE: Customer and Support Services Manager

FLSA STATUS: Exempt Non-Exempt

BARGAINING UNIT: RCWDEA RCWD MPCEA

DEFINITION

Under immediate supervision, perform basic billing, accounting, clerical, meter reading, or customer service duties. Some positions may rotate between a variety of these duties both in the office and the field

CLASS CHARACTERISTICS

CUSTOMER SERVICE REPRESENTATIVE I

This is the entry-level classification. Positions assigned to this level perform limited or routine billing, accounting, clerical, meter reading and customer service duties under close supervision. Employees at this level may be in a training capacity and typically does not require significant previous work experience in the applicable field. This job classification is represented by the Rancho California Water District Employees Association (RCWDEA) bargaining unit

CUSTOMER SERVICE REPRESENTATIVE II

This is the journey level classification. Positions assigned to this level perform a full range of billing, accounting, clerical, meter reading and customer service duties under general supervision. Employees at this level are expected to be fully trained and competent, and typically requires significant previous work experience in the appropriate field. This job classification is represented by the Rancho California Water District Employees Association (RCWDEA) bargaining unit

EXAMPLE OF DUTIES – OFFICE (Duties may include, but are not limited to, the following):

- ✎ Performs customer service functions, such as interacting with customers in person, via telephone and email and records service comments in the customer information system
- ✎ Responds to and resolves customer account questions, problems and complaints
- ✎ Verifies customer account information by telephone, email, mail or fax
- ✎ Submits emergency and non-emergency requests for field service orders for meter repairs, investigation of water leaks and other problems
- ✎ Performs billing functions, such as opening and closing accounts, calculating and processing utility bills, cashiering, calculating and processing billing adjustments and processing meter reads
- ✎ Performs administrative duties in support of department functions such as organizing and maintaining various files, preparing correspondence, forms, and specialized documents
- ✎ Works with delinquent account customers to establish payment arrangements to avoid shut-off; requests the preparation of payment arrangement letters for signature.
- ✎ Performs general office functions, such filing, data entry, and operating office equipment
- ✎ Adheres to office procedures including record management policies and procedures, ensuring compliance with the District's record retention policy









EXAMPLE OF DUTIES - FIELD (Duties may include, but are not limited to, the following):

- ✎ Visually reads customer meters as needed
- ✎ Conducts customer water service requests to include turning meters on and off and clearing meter boxes when required
- ✎ Delivers notifications to customers for planned shutdowns and turn-offs due to non-payment
- ✎ Answers questions and informs customers in matters dealing with observed leaks, service problems and general information in a tactful manner in order to enhance customer relations and refers customers to the appropriate department or individual as necessary
- ✎ Performs field verifications for meter locations
- ✎ Replaces meter box lids as needed
- ✎ Identifies meter service and reading irregularities or inconsistencies
- ✎ Occasional works in the office assisting with office staff duties
- ✎ Performs other duties as assigned







QUALIFICATIONS

Customer Service Representative I - Office

Knowledge of:








-  Basic accounting principles
-  Basic word processing and computer spreadsheets
-  Basic telephone and customer service techniques
-  Basic filing and organizational techniques
-  Proper work safety standards
-  District service routes
-  Basic customer service principles
-  District fees, rules and regulations

Ability to:




-  Type 30 - 35 WPM
-  Operate modern office equipment, including software applications
-  Compose general correspondence
-  Offer helpful information in order to create favorable public relations
-  Organize and prioritize a variety of assignments
-  Comply with the District's Safety, Health and Environmental policies

Customer Service Representative I - Field

Knowledge of:

-  Basic word processing and computer spreadsheets
-  Basic telephone and customer service techniques
-  Basic organizational techniques
-  Proper work safety standards
-  Service order route planning
-  Basic customer service principles
-  District fees, rules and regulations

Ability to:

-  Type 30 - 35 WPM, desirable
-  Operate modern office equipment and tools, including software applications
-  Offer helpful information in order to create favorable public relations

- ✎ Organize and prioritize a variety of assignments
- ✎ Comply with the District's Safety, Health and Environmental policies
- ✎ Accurately read and record meter information
- ✎ Operate electronic computerized hand-held device and AMR collector unit
- ✎ Use a variety of hand tools
- ✎ Operate a District cell phone and tablet device

SELECTION GUIDELINES

The appropriate knowledge, skills, and abilities can be achieved through a variety of combinations of experience and training. A typical example is:

Experience: **Office:** One (1) year experience of general accounting and/or clerical customer service, billing and/or field services experience with a public utility or equivalent

Field: One (1) year experience of customer service and/or field services experience with a public utility or equivalent

Training: Equivalent to the completion of the 12th grade

Licenses and Certificates:

Office

- ✎ Valid California driver's license, required

Field

- ✎ Valid California driver's license, required
- ✎ Grade D1 Water Distribution Certificate – CSDHS, required




*In addition to the qualifications for **Customer Service Representative I:***

Customer Service Representative II - Office

Knowledge of:








- ✎ Intermediate accounting principles
- ✎ Modern equipment and communication tools used for business functions, including computers and software programs relevant to work performed
- ✎ Intermediate customer service principles
- ✎ Automated meter reading systems, including the ability to identify potential leaks
- ✎ Basic water conservation principles and programs

Ability to:



-  Type 40 - 45 WPM
-  Operate modern office equipment and tools, including software applications
-  Assist in training new Customer Service Representatives

Customer Service Representative II - Field

Knowledge of:

-  All meter routes within District boundaries
-  District specifications for correct meter installation and/or repair
-  Meter size and rate flows
-  Operate AMR mobile collector unit
-  District policies, rules and regulations
-  Automated meter reading systems, including the ability to identify potential leaks
-  Basic water conservation principles and programs

Ability to:

-  Diagnose service-related problems and provide effective solutions
-  Assist in training new Customer Service Representatives

SELECTION GUIDELINES

The appropriate knowledge, skills, and abilities can be achieved through a variety of combinations of experience and training. A typical example is:

Experience: **Office:** One (2) years' experience in general accounting and/or clerical customer service, billing and/or services experience with a public utility or (2) years of experience as Customer Service Representative I

Field: Two (2) years of experience as a Customer Service Representative or similar position with a public utility and/or two (2) years of experience as a Customer Service Field Representative

Training: **Office:** Equivalent to the completion of the 12th grade, with some specialized training in accounting and/or customer service

Field: Any combination of formal or informal training and education

that provides the ability to read and write at a level required to perform the assigned duties satisfactorily

Licenses and Certificates:

Office:

- ✎ Valid California driver's license, required

Field:

- ✎ Valid California driver's license, required
- ✎ Grade D1 Water Distribution Certificate – CSDHS, required
- ✎ Grade D2 Water Distribution Certificate – CSDHS, desirable

PHYSICAL REQUIREMENTS/WORKING CONDITIONS

The essential functions of this position will require the employee to perform the following physical activities:

Office:

- ✎ Frequently use office equipment such as a computer, copier and FAX machine
- ✎ Must be able to carry, push, pull, reach and lift materials and objects up to 25 lbs
- ✎ Extended standing, walking, sitting, reaching, stooping, and bending
- ✎ Communicates verbally with District management, co-workers, and the public in face-to-face, one-on-one, and group meetings
- ✎ Regularly uses a telephone or radio for communication
- ✎ Ability to speak and hear both in person, by telephone, and radio
- ✎ Vision within normal ranges with or without correction.
- ✎ Regular attendance
- ✎ Work in a temperature controlled office environment with moderate noise.
- ✎ Occasional travel by automobile conducting District business

Field:

- ✎ Frequently use office equipment such as a computer, copier and FAX machine
- ✎ Must be able to carry, push, pull, reach and lift materials and objects up to 25 lbs
- ✎ Extended standing, walking, sitting, reaching, stooping, and bending
- ✎ Communicates verbally with District management, co-workers, and the public in face-to-face, one-on-one, and group meetings
- ✎ Regularly uses a telephone or radio for communication
- ✎ Ability to speak and hear both in person, by telephone, and radio
- ✎ Vision within normal ranges with or without correction.

- ✎ Regular attendance
- ✎ Work in a temperature controlled office environment with moderate noise.
- ✎ Frequently works in the field where noise is at times loud and employee may be exposed to hot and cold conditions; inclement weather, or traffic hazards

OTHER REQUIREMENTS

- ✎ Willingness to work nights, weekends and overtime, as necessary
- ✎ May be required to serve stand-by duty as assigned by management (field only)

_____	_____
Employee Signature	Date
_____	_____
Supervisor/Manager Signature	Date