

**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 supervision (Customer Services Representative I) or general supervision (Customer Services Representative II), performs a variety of customer service duties including those in support of the City's utility service and billing functions, business licensing, police department front desk, or other area to which assigned; performs a wide variety of accounts receivable, account maintenance, data entry, billing, and public contact work in support of the assigned customer service function.

DISTINGUISHING CHARACTERISTICS

Customer Services Representative I: This is the entry level class in the Customer Service Representative series providing general customer service support. Positions at this level are not expected to function with the same amount of program knowledge or skill level as positions allocated to the Customer Service Representative II level and exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. Advancement to the "II" level is based on demonstrated proficiency in performing the assigned functions and is at the discretion of higher level supervisory or management staff.

Customer Services Representative II: This is the full journey level class in the Customer Service Representative series performing the full range of customer service duties including cashiering, data entry, billing, public contact, and general office support duties with only occasional instruction or assistance. Positions at this level are distinguished from the Customer Service Representative I level by the performance of the full range of duties as assigned, working independently, applying well developed customer service knowledge, and exercising judgment and initiative. Positions 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. Work is normally reviewed only on completion and for overall results. Positions in this class series are flexibly staffed and positions at the Customer Service Representative II level are normally filled by advancement from the Customer Service Representative I level.

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.

General Functions:

- Performs a full range of customer service duties; answers customer questions; researches, resolves, and responds to customer problems and complaints; explains departmental policies and procedures to the public.
- Operates computer terminal to enter payments, new account and/or license information, changes to existing accounts or licenses, and related information.
- As assigned, issues and collects payments for bus passes.

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Customer Service Representative I/II (*Continued*)

- Issues payments for petty cash vouchers; submit petty cash reimbursement forms; order cash; balances petty cash.
- Monitors and maintains adequate quantities of supplies and forms; revises and stocks information sheets.
- Receives and processes incoming mail and returned mail.
- Performs related duties as required.

Utility Billing Functions:

- Receives and processes payments for water utility bills; processes checks and money orders received including verifying name, account number, dollar amount due and paid, and signature; researches and resolves billing problems; enters payment into computer; reconciles and adjusts customer accounts; generates notice of balance due or past due, as required; downloads payments processed daily.
- Receives and processes requests for water service including new service, restoration and termination.
- Serves as cashier; accepts and applies over the counter payments for a variety of City services including water utilities; enters payments into computer; balances receipts, counting and verifying money received; prepares deposits.
- Processes and verifies non-sufficient funds (NSF) checks received in payment for various City fees and charges; notifies customer; collects payments; directs receipts to proper departments; sends non-collected NSF's to collection officer.
- Assists customers with temporary meters and new meters; processes meter exchanges; records meter sales; sets up computer records for new meter installations; maintains meter inventory.
- Participates in the preparation and maintenance of a variety of files, logs, records, and reports; transfers files to and from San Diego Gas and Electric; prints and distributes reports; participates in the auditing of a variety of reports including water usage reports; identifies and corrects errors and reconciles discrepancies; requests and processes rereads and adjusts utility bills.
- Generates and mails periodic computer billings and correspondence including delinquent and courtesy notices.
- Processes credit refunds; verifies account information; processes request for refund from accounts payable; sends report to accounts payable for processing of checks.

Business License Functions:

- Receives and processes business license applications and business license renewals; verifies accuracy of information on applications, collects business license tax fees, and posts payments; routes applications to appropriate departments for review and action.
- Refers new business license applications to other City departments and outside agencies to expedite the application process; informs new business license applicants of services available to them.
- Performs daily audit process; verifies payment batches and balance daily deposits.
- Reconciles and adjusts customer accounts; accesses penalties for late business license payments.

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Customer Service Representative I/II (*Continued*)

- Processes payments of Business Improvement District (BID) fees; answers inquiries; processes request for payment of monthly BID fees to Downtown Business Association.
- Processes business license renewals, new business licenses, and delinquent business licenses for mailing each month; print and mail business licenses.
- Processes daily permits for nonprofit organizations and special events.
- Computes and issues or authorizes refunds of deposits and business license fees.

Customer Service Center Functions:

- Offers passport services to individuals needing to obtain a United States passport; processes passport application; reviews information; retains appropriate documents; collects fees; logs applications into computer system.
- Provides information and assistance in response to customer's questions and concerns; refers customers to appropriate City department or local service agency for assistance.
- Creates and revises documents describing the services and information available at the Citizen Service Center.

Police Department Front Desk Functions:

- Processes criminal registrants and all related paperwork according to Department of Justice standards.
- Operates computer terminal to enter new criminal registrant data; makes changes to existing data and related information.
- Enters pertinent data on arrestees into Booking computer and takes photographs; fingerprints a variety of individuals.
- Accepts and processes paperwork for repossessed vehicles; collects payments for citations, impounded vehicle fees, police reports, and other various payments; balances daily cash drawer and completes receipts detailing payment transactions.
- Retrieves information from a variety of law enforcement data bases; maintains accuracy, confidentiality and security of all records and work area; releases records according to the California Public Records Act and department policy.
- Participates in the preparation, revision and maintenance of a variety of documents, files, logs, records, and reports.
- Processes background checks and creates letters of reference; processes ride-along applications and appointments.
- Receives telephone calls from the public; screens calls to determine needs of the caller; logs in/out visitors and issues visitor badges.
- Accepts service of subpoenas and other court related documents.

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Parking Coordinator Functions:

- Serves as parking coordinator for the City; mails invoices, applications, and fliers; receives applications for permits for the vehicle parking district; issues and collects payments for permits; replaces lost permits; issues quarterly renewal notices; maintain records of changes.

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:

Bookkeeping and clerical accounting principles, practices, and terminology.
Methods, procedures, practices, and terminology used in billing and financial record keeping work.
Modern office procedures, methods, and equipment including computers, typewriters, printers, copiers, and telephone answering devices.
Computer applications such as word processing, spreadsheets, and statistical databases.
Principles and practices of fiscal, statistical, and administrative record keeping and reporting.
Principles of business letter writing and basic report preparation.
Methods and techniques used in customer service and public relations.
Receptionist and telephone techniques.
Basic programs and services of the organization relating to service fees, billing, and account maintenance.
English usage, spelling, grammar, and punctuation.
Mathematical principles.

Ability to:

Perform responsible bookkeeping, clerical accounting, and customer service duties.
Understand the organization and operation of the City and of outside agencies as necessary to assume assigned responsibilities.
Understand, interpret and apply general and specific administrative and departmental policies and procedures.
Exercise tact and judgment in responding to inquiries and resolving complaints and problems.
Make mathematical computations rapidly and accurately.
Find and reconcile discrepancies in balancing accounts.
Implement and maintain standard filing systems.
Maintain records and reports.
Operate and use modern office equipment including a computer and various software packages.
Operate 10-key calculator by touch.
Type and enter data at a speed necessary for successful job performance.
Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
Demonstrate an awareness and appreciation of the cultural diversity of the community.
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 - *Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

Customer Services Representative I/II

Education/Training:

Equivalent to the completion of the twelfth grade.

Customer Services Representative I

Experience:

One year of clerical accounting or cashiering experience involving considerable public contact.

Customer Services Representative II

Experience:

Two years of responsible experience performing duties comparable to a Customer Service Representative I in the City of Escondido or comparable experience performing clerical accounting duties involving considerable public contact.

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: Standard office setting. Exposure to dust from paperwork. Work schedule is 9/80 with alternating Fridays off in a biweekly period. Work environment is both formal and informal, team- and autonomy-oriented, having variable tasks, pace and pressure.

Physical: Primary functions require sufficient physical ability to work in an office setting and operate office equipment. CONTINUOUS sitting, upward and downward flexion of neck; fine finger dexterity and light to moderate finger pressure to manipulate keyboard, equipment controls, and other office equipment; pinch grasp to manipulate writing utensils. FREQUENT side-to-side turning of neck, walking, standing, bending and stooping, pushing/pulling, twisting at waist, moderate wrist torque to twist equipment knobs and dials; lifting objects weighing up to 20 lbs. from below waist to above shoulders and transporting distances up to 50 yards. OCCASIONAL squatting, kneeling, reaching above and at shoulder height, moderate grasping to manipulate reference books and manuals; lifting objects weighing 20-35 lbs. from below waist to above shoulders and transporting distances up to 50 feet.

Vision: See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate equipment.

Hearing: Hear in the normal audio range with or without correction.