

**COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
CUSTOMER SERVICE SPECIALIST I**

CLASS TITLE: CUSTOMER SERVICE SPECIALIST I

DEFINITION

Under general supervision, performs a variety of responsible customer support activities related to the establishment and maintenance of customer accounts; serves as a front-line customer support position working with the public in person, on the phone or e-mail, including processing customer requests for service; utility payments; responding to customer inquiries and complaints. Completes accurate and timely statements and reports related to customer accounts and District payments., Essential functions include: customer service administration, accounts receivable/billing, accounts payable/general ledger, general office administration, and water service processing. Performs related duties as required.

DISTINGUISHING CHARACTERISTICS

This classification is the entry and full working level, and reports to the Office Manager (or designate.) Scope of work is moderately difficult in nature, encompassing a full range of customer service, secretarial and some accounting duties. Members of this class may be assigned to one of the essential areas of responsibility (accounts receivable/billing, accounts payable/general ledger, etc.) or may perform duties in several areas. Incumbents may serve as backup to other positions in the class and cross training may be required. Incumbents receive close supervision and training initially but after a period of time are expected to perform routine tasks independently, with little or no immediate supervision.

The Customer Service Specialist I is the first of two levels in the Customer Service Specialist class series. The capable, fully competent employee in this classification will perform increasingly difficult and responsible assignments. Incumbents are eligible to advance to the Customer Service Specialist II level after four to five years of successful experience at the Customer Service Specialist I level, demonstrated proficiency to perform higher level work of the Customer Service Specialist II, recommendation of the Office Manager and approval of the General Manager.

There are no supervisory duties.

EXAMPLES OF DUTIES

Duties may include, but are not necessarily limited to:

Area of Responsibility:

Customer Service:

- Provides front-line customer service support by greeting customers at the front desk or by telephone, including accepting payments.

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- Responds and provides information to customer inquiries and complaints in person or by telephone; researches, identifies potential causes, and provides recommendations for the resolution of unusual billing situations; represents the District to callers and visitors in a professional and customer friendly manner.
- Receives and processes service requests and transfer orders, sets up and closes accounts, processes “in and out” tags; determines and collects necessary charges; updates customer and meter information in the utility billing system.
- Utilizes the District’s enterprise systems to review and analyze customer accounts, including the District’s Utility Billing and Automated Metering Infrastructure (AMI) Systems; and Customer Web Portal.

When assigned to Accounts Receivable/Billing

- Processes customer payments and deposits;
- Supports Utility Billing Specialist as required, including preparing and sending customer bills, notices, and final billing;
- Documents new and cancelled accounts, including preparing “in and out” tags and inputting changes into the computer; Prepares report for refunds due and processes yearly deposit refunds;
- Prepares bank deposits; balances cash drawer;
- Notifies customers of insufficient funds and tracks account for payment;
- Transfers credits and deposits between customer accounts when necessary.

When assigned to Accounts Payable/General Ledger

- Prints checks, prepares for signature, and mails payments;
- Adds new vendors, coding with appropriate account number, and enters invoices to be paid;
- Maintains, sets up, and stores accounts payable documents and project files;
- Organizes payroll timesheets, processes payroll in computer and issues paychecks and direct deposits; prepares payroll taxes;
- Calculates, verifies, and processes health benefits payments for all employees and retirees;
- Identifies and enters or adjusts monthly journal entries; calculates, verifies, and processes general ledger;
- Disburses and balances petty cash;
- Calculates fiscal year deposits.

When assigned to General Office Administration

- Performs word processing and other office duties requested by General Manager or Superintendent;
- Initiates and composes District forms and letters related to assignment;
- Operates voice mail and retrieves messages from after hours, weekends, and holidays;
- Files District correspondence, reports and other documents in timely manner;
- Monitors and replenishes funds into postage meter, as needed.

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MINIMUM QUALIFICATIONS

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

Training and Experience:

- 3+ years of customer service, secretarial and/or accounting/bookkeeping experience with a demonstrated knowledge of work processes and clerical office administration procedures. Prefer experience with a public utility.
- High School diploma or equivalent.
- Demonstrated proficiency with the use of computer software including MS Office (Excel and Word) and customer service/utility billing computerized systems.
- Possess California Driver's License.

Knowledge of:

- Modern office and record keeping practices, methods, and procedures.
- Basic arithmetic, including the ability to perform fast and accurate calculations.
- Basic Accounting/Bookkeeping practices.
- Basic business letter writing and the standard format for reports and correspondence.

Ability and skill to to:

- Deal tactfully with the public and others in providing information, answering questions, and providing customer service, even under difficult or stressful conditions.
- Respond to and effectively prioritize multiple phone calls and other requests or interruptions.
- Evaluate customer problems/concerns and exercise independent judgment to resolve them.
- Learn District policies and procedures regarding signup for service, payment procedures, delinquent bills, etc.
- Prioritize work and follow through to completion.
- Prepare and maintain neat, accurate, and concise records and reports
- Understand and carry out oral and written instructions.
- Speak and write clearly.
- Use initiative and independent judgment within established guidelines
- Establish and maintain pleasant and cooperative working relationships with employees and the general public

PHYSICAL REQUIREMENTS

Incumbent must be able to function in an office environment in work primarily of a sedentary nature, and be able to perform the following, with or without reasonable accommodation:

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- Sit, often for long periods of time
- Utilize vision, hearing and speech
- Utilize manual and finger dexterity
- Turn head and trunk
- Move about on smooth surfaces
- Stand
- Lift and carry (maximum 35 pounds)
- Reach, twist and bend

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Each incumbent does not necessarily perform all duties.