



Customer Account Representative I/II

DEFINITION

Under supervision (Customer Account Representative I) or general supervision (Customer Account Representative II) 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, outreach for various District programs, and addressing customer inquiries and complaints; and performs 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 learn and perform basic clerical duties while learning to receive and process payments and handle customer inquiries and complaints. Assignments are given in specific terms and are subject to frequent review while in progress and upon completion by the Customer Service Supervisor. There is limited latitude for independent judgment and action in well-defined areas of work.

This classification is distinguished from the experienced, 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. Upon recommendation of the immediate supervisor and approval by the department manager, incumbents in this class may advance to the Customer Account Representative II after a minimum of two (2) years at the first level and with demonstrated proficiency to meet the job requirements of the Customer Account Representative II classification.

Customer Account Representative II is the experienced, journey level class in the Customer Account Representative series. Under general supervision, within a framework of established policies and procedures, incumbents are fully competent, with a high level of accuracy, 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 by the Customer Service Supervisor. There is some latitude for independent judgment and action in well-defined areas of work.

The Customer Account Representative II is distinguished from the Customer Account Representative I in that the Customer Account Representative II performs assignments of increased complexity and works with greater independence whereas the Customer Account Representative I performs assignments that are more routine and narrower in scope. This

classification is further 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; research questions or problems and follows up as required or refers to appropriate personnel for resolution.
- Performs various duties related to billing, including scheduling billing, auditing bills, resolving billing errors, reviewing customer accounts for completeness and accuracy, entering meter readings, and collaborating with field staff to confirm consumption amount and possible leaks.
- Assists customers with setting up online accounts, including enrolling in payment plan, troubleshooting user issues and resolve challenging customer interactions.
- 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; post payments; creates or updates master customer account files and related meter records; creates 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; reads tract maps and research 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 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:

Possession of a high school diploma or its equivalent; and

Customer Account Representative I: One (1) year of full-time general office support work which includes interpreting and explaining policies and procedures to the public.

Customer Account Representative II: Two (2) years of full-time experience equivalent to that of a Customer Account Representative I within the District

Knowledge, Skills, and Abilities:

Knowledge of standard office practices and procedures, including record keeping principles and procedures; proper written and spoken English, including spelling, punctuation, and grammar; basic business arithmetic; effective and appropriate public contact and telephone techniques; professional business writing; modern office practices, methods, and computer equipment and applications related to the work, including word processing, database, and spreadsheet software.

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; perform essential duties of the job without causing harm to self or others; work independently and as a member of a team in a fast-paced, high volume environment; reconcile and diffuse escalated situations with customers; operate modern office equipment including computer equipment and specialized software applications programs; communicate clearly and concisely, both orally and in writing; establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Customer Account Representative II: (in addition to the above)

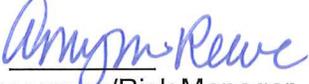
Advanced knowledge of practices and procedures related to accounting for receipts and the maintenance of customer accounts; basic business data processing principles related to customer account record keeping.

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.

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.

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Approved: 
Human Resources/Risk Manager