

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

CLASS TITLE: CUSTOMER SERVICE SPECIALIST II

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; and responding to customer inquiries and complaints; administers and maintains accurate and timely statements and records for water services; receives, investigates, analyzes and resolves problems and inconsistencies in customer accounts in coordination with the District's field and water conservation staff; prepares, reviews, analyzes and interprets computer reports and data related to customer accounts and water usage.

Also performs a wide variety of accounting support duties and data analysis in the preparation, maintenance, and processing of accounting records and financial transactions, including the areas of utility billing, accounts receivable, and payroll; trains, assigns, and reviews work of Customer Service Specialist I; performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

This class reports to the Office Manager (or designate.) The Customer Service Specialist II is the advanced journey, lead level of the Customer Service Specialist class series. The incumbent uses considerable independent judgment and problem solving to research and resolve problems of moderate scope and complexity. This classification performs moderately responsible and difficult accounting, data analysis, and clerical duties that may require application of standard District policies and procedures, as well as development of new techniques and/or procedures. Specialized work assignments within the class may also require that the incumbent possess strong computer and data analytical skills. The incumbent provides training to subordinate Customer Service Specialist I and provides input for performance appraisals. This class is distinguished from the Utility Billing Specialist in that the latter is responsible for overseeing all utility billing functions.

A Customer Service Specialist I is 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.

EXAMPLES OF DUTIES

Duties may include, but are not necessarily limited to:

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Area of Responsibility:

Customer Service:

- Provides front-line customer service support by greeting customers at the front desk or by telephone.
- 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; and represents the District to callers and visitors in a professional and customer friendly manner.
- Interprets policies and procedures and explains service fees, rates, and procedures to customers; may waive fees under appropriate circumstances and with supervisory approval.
- Receives and processes service requests and transfer orders, sets up and closes accounts, processes “in and out” tags; determines and collects necessary charges and secures legal documents regarding property descriptions and ownership; resolves issues and problems regarding the processing of orders and delinquent accounts.
- 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/Utility Billing

- Opens or receives payments, audits for correctness, inputs to computer; verifies computer reports in order to prepare bank deposits;
- Prepares, mails, and ensures the accuracy of a variety of correspondence to customers in order to maintain system efficiency including final bills, reminder notice for inactive customer accounts, and cut-off or 48-hour notices, etc.;
- Receives inquiries regarding accounts from customers over the phone, in person, mail, fax, and/or email;
- Prepares cut-off notices; reports for refunds due, non-sufficient funds, etc., and audits for accuracy; provides customer account information to appropriate external parties such as the accountant, city or county personnel, and collection agency. Manages customer payment plans;
- Prepares and monitors bank deposits and statements for customer receipts;
- Researches, interprets, and analyzes account history to resolve billing questions on meter reads; calculates appropriate high bills adjustments for customers and makes debit/credit adjustments in accordance with District policies.

When assigned to: Payroll

- Receives, reviews, verifies, and processes time recording documents to prepare payroll for all District employees; audits such documents for completeness, accuracy, and compliance with rules and regulations; prepares and balances payroll reports and records.

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- Processes, calculates, and maintains records of a variety of payroll actions; maintains employee records for voluntary and non-voluntary deductions; prepares payroll warrants and wire transfers; prepares reports and payments for various tax, financial, and insurance organizations.

When assigned to: *Data Analytics/Advanced Metering Infrastructure (AMI)/Web Portal Support*

- In coordination with the Utility Billing Specialist, serves as a power user for the District's AMI System. Performs data entry surrounding AMI set-ups; customer "ins and outs;" meter readings for billing purposes; and daily AMI database maintenance as required.
- Daily monitors diagnostic reports from the District's AMI System, Web Portal and Utility Billing System to identify abnormal usage and leaks. Initiates field service orders to investigate potential issues.
- Implements and maintains the District's Customer Web Portal and trains customers on the use of the portal. Analyzes web portal data and follows up with customers as required.
- Proactively contacts and/or respond to inquiries from customers with high bills or abnormal usage on a timely basis.
- Generates and analyzes reports from the District's enterprise systems to flag high or low reads or unusual trends.
- Supports the Water Resources Analyst as required, including promoting water conservation efforts.
- Participates in the monthly utility billing functions in cooperation with the Utility Billing Specialist.

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:

- 5+ years of experience in a customer service role, preferably in a water utility or public agency.
- Demonstrated ability to problem-solve customer issues, and to deal courteously and effectively with the public. Experience in training customers on new systems is a plus.
- Demonstrated proficiency with the use of computer software and systems including MS office (Excel) and customer service/utility billing systems. For work assignments, specializing in Data Analytics/AMI/Web Portal and/or utility

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billing, advanced proficiency with computer systems/analytical software is required.

- Demonstrated ability to analyze large sets of data and to draw meaningful conclusions; create reports and to effectively communicate conclusions.
- College Degree is preferred, but not required.
- Possess California Driver's License.

Knowledge of:

- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- Terminology and practices of financial and account document processing and record-keeping, including accounts receivable, accounts payable, utility billing, and payroll.
- Appropriate procedures, practices, rules, and policies governing office and/or system assignment.
- Basic business letter writing and the standard format for reports and correspondence.
- Basic meter operation and disconnection techniques.

Ability and skill 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.
- Negotiate with customers within scope of responsibility.
- Tactfully obtain sensitive information from customers, other agencies and business representatives.
- Perform a wide range of customer service functions with speed and accuracy and apply good judgment in recognizing scope of authority.
- Conduct basic research related to assignment.
- Make accurate arithmetic, financial, and statistical computations.
- Interpret and apply policies, procedures, standards and requirements related to assigned responsibilities.
- Plan, organize, coordinate, and prioritize assigned tasks to meet deadlines successfully.
- Train, guide, and coordinate the work of subordinate Customer Service Specialist I.

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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:

- 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. Not all duties are necessarily performed by each incumbent.