



Customer Service Technical Specialist

Department: Finance
FLSA Status: Non-Exempt
Salary Grade: 19, 21

SUMMARY DESCRIPTION

The Customer Service Technical Specialist plays a critical role in providing an interface between the District and its customers. The position has the same daily customer service responsibilities as the CSS, but must possess the skills to interface with IS and software vendors and perform more technical duties. Duties include but are not limited to the following: utilizing the District’s computer billing system to calculate and produce potable water, recycled water and wastewater bills; handling a large volume of incoming customer calls with follow-up via phone, email or written correspondence; establishing new accounts, setting up new services, entering comments, and posting payments; creating and processing computer queries for customer and statistical reporting; resolving problems and trouble-shooting customer issues through research; explaining, educating and enforcing District policies and regulations; using MS Office Suite daily for scheduling and preparing a variety of correspondence, documents and spreadsheets; and implementing District security procedures for visitors to the Administration building. The technical specialist also works closely with Field Service Technicians to perform accurate and timely billing, discontinuance of service for non-payment, service order ticket resolution, and high bill investigations. The technical specialist provides higher-level technical support in CIS and other software interfaces, database access, and report generation, in order for the department to work independently rather than requiring inter-department assistance which is vital because of the time sensitive nature of the tasks handled by the department.

ESSENTIAL DUTIES

Grade 19	Grade 21	DUTY NO.	ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)
C	P	1.	Assists customers by phone, mail, e-mail or in person with questions and problems related to their account(s) including leaks, services, billing, and field service requests. Researches and resolves problems. Explains, educates, and enforces District policy and procedures.

Grade 19	Grade 21	DUTY NO.	ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)
C	P	2.	Answers phones, greets visitors, handles vendor pick-ups and deliveries, directs inquiries to appropriate staff/locations, and processes all Administration Building payments through cash register.
C	P	3.	Processes property and tax liens; monitors tax assessment activity.
C	P	4.	Performs billing activities including data entry; running computer programs; analyzing reports; researching and correcting accounts; contacting customers; calculating and reviewing charges; preparing and transferring electronic file for bill creation; and resolving related billing problems.
C	P	5.	Collects and processes receivables, deposits and other payments; enters data into computerized billing system; balances daily payments and receipts.
C	P	6.	Processes returned payments.
C	P	7.	Reconciles weekly billing receivables, deposits and quarterly capacity/ installation liability accounts.
C	P	8.	Processes incoming, outgoing and interoffice mail; prepares and runs computer programs to create, print, mail, and/or email informational packets.
C	P	9.	Prepares forms and documents such as notices, schedules, correspondence, service information and reports using MS Office Suite, spreadsheets and custom software; maintains customer and District files and/or records ensuring complete and accurate information is provided.
C	P	10.	Determines, creates and maintains department calendar in relation to billing, delinquency steps, workload assignments, staffing schedules and department coverage.
C	P	11.	Reviews, researches and responds to formally appealed charges using District policy and judgment to determine appropriate level of adjustment.
C	P	12.	Follows up and reviews unpaid customer accounts, forwarding to District collection agency if necessary.
C	P	13.	Enters new Board approved water and sewer rates into CIS database to ensure customer bills are accurate.
C	P	14.	Partners with Field Service Technicians to ensure workload is communicated and completed in an efficient manner including daily syncing of meters and radios and dispatching service orders to Mobile.
C	P	15.	Runs the five notices for delinquency processing; stays current with and adheres to all legal requirements.
C	P	16.	Establishes new accounts in CIS related to new development.

Grade 19	Grade 21	DUTY NO.	ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)
C	P	17.	Performs beginning of the month and month-end processing to support accounting department with accurate monthly data and cash balancing.
C	P	18.	Promotes and educates customers on the use of Aquahawk for tracking water use, encourage conservation, search for leaks, etc.; and Infosend's electronic bill pay and presentment platform to streamline payments, reduce delinquencies, increase efficiency, etc.
C	P	19.	Generates and tracks payment arrangements for delinquent customers.
C	P	20.	Processes leak appeals and provides updates to the Board.
C	P	21.	Collects annual consumption data and other info from neighboring Districts.
C	P	22.	Assigns user permissions in CIS and adds/removes users.
C	P	23.	Ensures payment files are available daily and performs corrective action if not.
C	P	24.	Works with Advanced, the CIS Vendor, to open and respond to tickets when issues arise.
C	P	25.	Starts, stops, and adds tasks to scheduler.
C	P	26.	Applies spot builds on the system as code changes are provided.
C	P	27.	Refreshes the CIS Test environment regularly.
C	P	28.	Prepares the weekly bill reading file for billing.
C	P	29.	Performs other duties of a similar nature or level.

Competent – Having requisite or adequate ability or qualities.

Proficient – A through competence derived from training and practice.

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 (position requirements at entry):

1. Strong computer skills and mastery of the multitude of software programs and interfaces used by the department including Aquahawk, EBPP (Infosend), Infosend billing, Mobile dispatch, CIS V4, Munis, Near Map, Helix Portal, Paymentus Agent Dashboard, agent dashboard test for customer notices;
2. Working knowledge of Real Quest, Stealth AMI, Beacon, and Zenner Stealth.
3. Advanced knowledge of MS Office Suite (Outlook/Word/Excel).
4. Knowledge of all District water/sewer service rules, policies, practices and procedures for operations, field services, billing, collections and credit.
5. Knowledge of the District's service area and characteristics of its customer base.
6. Customer Service etiquette and techniques.

7. General accounting principles.
8. Standard office practices and procedures.
9. Business communication skills and correct use of the English language including spelling, grammar and punctuation.
10. Understands legal property descriptions, trust documents, and bankruptcy chapters. Recognizes and can document Red Flag Alerts and Identity Theft.

Skills/Abilities (position requirements at entry):

1. Ability to handle challenging and sensitive customer situations calmly and defuse such situations using diplomacy, tact and decisiveness.
2. Ability to make reasonable deductions and judgments to resolve customer issues and perform job related duties.
3. Ability to maintain accurate and complete records and preserve the confidentiality of information.
4. Ability to effectively process a high volume of customer interactions via telephone, email, or in-person adhering to exceptional standards of customer service.
5. Ability to communicate clearly and effectively, both verbally and in writing.
6. Excellent interpersonal skills in all interactions with coworkers, management, the Board and the general public sufficient to exchange or convey information and to receive work direction in a positive manner.
7. Ability to actively listen, communicate clearly and professionally, and convey, educate, and discuss various topics with customers while respecting the confidentiality of sensitive information.
8. Must be highly accurate and technical.
9. Ability to work and train with IS, AMI, and Finance department personnel to learn minor programming, software, file retrieval, and other functions that increase efficiency and reduce reliance on other departments to carry out customer service functions.

Training/Experience Required (position requirements at entry):

1. High School Diploma or General Equivalency Diploma (G.E.D.) and two years' experience working in an office setting with considerable customer contact and six months or more data entry experience; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.
2. Proficient in all CSS responsibilities
3. Mastery of the multitude of software programs and interfaces used by the department. Examples include: Aquahawk, EBPP (Infosend), Infosend billing, Mobile dispatch, CIS V4, Munis, Near Map, Helix Portal, Paymentus Agent Dashboard, agent dashboard test for customer notices;

Licensing Requirements (position requirements at entry):

1. Valid California Driver's License.

Safety Priorities:

1. Knowledge of general office and field safety
2. Proper reporting of safety violations, accidents and injuries.
3. Completes required and assigned safety and training assignments in a timely manner.
4. Understands proper lifting techniques.
5. Has the ability to work in a safe and efficient manner.

Physical Requirements:

1. Positions in this class typically require: sitting, standing, lifting, pulling, pushing, walking, dexterity, grasping, talking, hearing, seeing and repetitive motions.
2. Medium Work: Exerting up to 30 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.

Classification History:

Date: 04/23