

**TAHOE-TRUCKEE SANITATION AGENCY**  
**Class Specification**

**Job Title: Customer Service Specialist I/II**

**Department: Administrative Services**

**FLSA Status: NON EXEMPT**

**Revised as of: 12/2020**

**DEFINITION**

Performs technical work involving financial record keeping, utility billing and customer service; receives and responds to utility billing questions, serving as liaison between the Agency and customers by answering questions and solving utility billing issues; and performs commercial and residential property inspections.

**DISTINGUISHING CHARACTERISTICS**

Customer Service Specialist I - This is the entry level class in the Customer Service Specialist series. Positions in this class typically require little directly related work experience. The Customer Service Specialist I class is distinguished from the II level by the performance of less than the full range of duties assigned to the II level. Incumbents work under immediate supervision while learning job tasks, progressing to general supervision as procedures and processes of assigned area of responsibility are learned.

Customer Service Specialist II - This is the journey level class in the Customer Service Specialist series and is distinguished from the I level by the assignment and satisfactory performance of the full range of duties. Employees at this level receive relatively less instruction or assistance, as employees at this level are expected to be fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the I level once the incumbent meets the qualification standards of the II level, demonstrates an ability to perform the full scope of the work, and otherwise meets performance standards.

**SUPERVISION RECEIVED AND EXERCISED**

Customer Service Specialist I

Reports directly to, and receives immediate supervision from the Finance and Administrative Department Manager.

Customer Service Specialist II

Reports directly to, and receives general supervision from the Finance and Administrative Department Manager.

## **CLASS TITLE: Customer Service Specialist I/II**

**EXAMPLES OF DUTIES:** *the duties specified below are representative of the range of duties assigned to this class and are not intended to be an inclusive list.*

- Maintains customer account information using the Agency's utility billing system. Sets up and maintains a variety of customer, account and category files; ensures accurate input of data into utility billing system.
- Performs daily operations and activities of Customer Service; recommends improvements and modifications; prepares various reports on operations and activities.
- Processes annual County tax collection, lien and bankruptcy claim processes between the three Counties within the five member districts.
- Performs first-line customer service duties including answers phones, assists the general public in person with inquiries, on the phone, via mail or by email.
- Receives and responds to customer inquiries and questions regarding bills; processes payments; researches and resolves payment discrepancies and customer complaints.
- Reviews and audits customer accounts; analyzes and researches discrepancies in financial documents and transactions.
- Performs plan checks for residential and commercial structures and calculates appropriate fees; issues permits in Agency permit portal.
- Prepares a variety of letters, correspondence and transmittals.
- Oversees, monitors and assists with geographical information system (GIS) parcel information updates.
- Calculates and prorates or adjusts utility bills for partial periods; posts received cash to account records.
- Conducts off-site inspections for utility billing purposes.
- Processes and updates records related to property transfers and splits.
- Maintains a variety of records and reports related to assigned duties.
- Interacts with public agencies and title companies to identify new customer accounts.
- Represents the Agency with dignity, integrity, and the spirit of cooperation in all relations with staff and the public.
- Builds and maintains positive working relationships with co-workers, other Agency employees and the public using principles of good customer service.
- Performs related duties as assigned.

## **QUALIFICATIONS**

### Customer Service Specialist I

#### **Knowledge of:**

- Principles and practices of customer service including the processing of utility billing.
- Procedures, policies, and rules affecting the development, maintenance and control of utility billing and record keeping.
- Principles of accounting as it relates to accounts receivable.

## **CLASS TITLE: Customer Service Specialist I/II**

- Practices of financial and statistical recordkeeping including automated accounting and bookkeeping systems.
- Pertinent local, State and Federal laws, ordinances and rules.
- Mathematical calculations related to financial record keeping.
- Modern office practices, methods, and computer equipment including relevant software programs.
- Operation of office equipment including personal computers, fax machines, copiers, printers, telephones, voicemail and e-mail systems, etc.
- Oral and written communication skills; business English including vocabulary, spelling, and correct grammatical usage and punctuation.
- Safe work practices.
- Principles and practices of customer service.

### **Ability to:**

- On an ongoing basis, know and understand all requirements and essential aspects of the job including laws, regulations, rules, and codes related to area of assignment; intermittently access, review, analyze and adjust technical documents, work orders, reports and other files and records; train others; observe performance, review and evaluate the work of others; problem solve issues related to area of assignment; remember various processes and requirements; identify, interpret and communicate technical and numerical information and instructions.
- Interpret and explain pertinent Agency and department policies and procedures.
- Learn to perform difficult and responsible technical work involving financial and related statistical record keeping.
- Learn to know, understand and perform job-related operations; learn requirements and essential aspects of the job; learn to observe and report problems; learn to review, analyze and interpret documents and information, remember instructions; and communicate information to others.
- Learn to prepare, process, review, and check submitted accounting and financial documents, records, and forms for accuracy, completeness and conformance to applicable policies, rules, and regulations.
- Learn to research and compile technical and financial information.
- Operate a personal computer for data entry, inquiry, and report generation.
- Make accurate mathematical calculations.
- Make appropriate decisions regarding billing adjustments.
- Respond to and assist in the more routine inquiries related to financial accounting records and processes.
- Understand and carry out oral and written instructions, and prioritize workload to meet deadlines.
- Read, write and comprehend the English language at a level necessary for effective job performance exercising correct English usage, vocabulary, spelling, grammar and punctuation.
- Communicate effectively, tactfully and positively in both oral and written form.

## **CLASS TITLE: Customer Service Specialist I/II**

- Operate and use modern office equipment and technology, including computers and applicable software.
- Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.
- Utilize appropriate safety procedures and practices for assigned duties.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Contribute effectively to the accomplishment of Agency goals, objectives and activities.

### **Experience and Education:**

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

### **Experience:**

Two years of customer service experience that includes the determination and processing of billing information experience is desirable.

### **Education:**

Equivalent to completion of twelfth grade required with additional college courses in accounting, business, finance or a related field desirable.

## **SPECIAL QUALIFICATIONS**

### **License and Certificate:**

Possession of a valid California or Nevada Class C Driver License is required.

### **Customer Service Specialist II**

In addition to the above-listed qualifications for Customer Service Specialist I:

### **Knowledge of:**

- Practices, methods, and terminology used in financial and statistical record keeping.
- Principles and practices of routine analytical research.
- Pertinent local, State and Federal laws, ordinances, rules and regulations.

### **Ability to:**

- Independently perform difficult and responsible technical work involving financial and related statistical record keeping.
- On an ongoing basis, know, understand and explain operations; know all requirements and essential aspects of the job; intermittently observe and analyze and recommend solutions to problems; review, analyze and interpret documents and information, remember instructions; and communicate tasks or projects to others.

## **CLASS TITLE: Customer Service Specialist I/II**

- Prepare, process, review, and check submitted accounting and financial documents, records, and forms for accuracy, completeness and conformance to applicable policies, rules, and regulations.
- Independently research and compile technical and financial information.
- Respond to and assist in resolving difficult and/or sensitive inquiries related to financial accounting records and processes.

### **Experience and Education:**

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

### **Experience:**

Two years of applicable experience similar to Customer Service Specialist I with T-TSA.

### **Education:**

Equivalent to completion of twelfth grade required with additional college courses in accounting, business, finance or a related field desirable.

## **SPECIAL QUALIFICATIONS**

### **License and Certificate:**

Possession of a valid California or Nevada Class C Driver License is required.

### **PHYSICAL REQUIREMENTS (for Customer Service Specialist I and II)**

Work effectively at desk, table or counter for long periods of time; travel to conduct off-site inspections; intermittently move around the office while performing work activities and to reach needed items; manipulate and file documents; operate and adjust office equipment; manipulate, activate, operate and adjust equipment; ascend and descend ladders or step stools to reach equipment or other items and to access areas out of reach; and move or transport weight of 20 pounds or less.

### **WORKING/ENVIRONMENTAL CONDITIONS (for Customer Service Specialist I and II)**

Work is performed in a typical temperature controlled office environment subject to typical office noise and environment. Additional work may be performed outdoors with exposure to all weather conditions.