



# Marina Coast Water District

11 Reservation Road, Marina, CA 93933  
(831) 384-6131 | Fax (831) 883-5995

## CUSTOMER SERVICE / BILLING TECHNICIAN I/II

### DEFINITION

Under general supervision, performs a variety of office support duties related to the establishment and maintenance of customer accounts for water and wastewater services; prepares monthly utility billing; provides direct customer service associated with utility payments, requests for service, responding to complaints and providing information; performs related work as required.

### SUPERVISION RECEIVED AND EXERCISED

General supervision is given by the Customer Service/Billing Supervisor. No direct supervision of staff is exercised.

### CLASS CHARACTERISTICS

#### Customer Service/Billing Technician I

This is the entry-level class within the Customer Service/Billing series. Initially, incumbents with some customer service or administrative support experience learn the District's customer service and billing systems, operations, practices, and procedures. As experience is gained, assignments become more varied and are performed with greater independence. Assignments may vary with skill and training of the incumbent. This class is flexibly staffed with the Customer Service/Billing Technician II and incumbents may advance to the higher-level class after demonstrating the ability to perform the work of the higher-level class. Advancement from the Customer Service/Billing Technician I level to the Customer Service/Billing Technician II level is in accordance with District policies and procedures, including receiving the recommendation for advancement from the respective Department Manager or designee. Some of the requirements to move to the II-level include demonstrating a thorough understanding of the department's policies and procedures; successfully performing billing functions for three consecutive months; successfully performing past due notices functions for three consecutive months; and successfully performing collections and appeals functions two consecutive times.

#### Customer Service/Billing Technician II

This is the journey-level classification within the Customer Service/Billing series. This class is distinguished from the Customer Service/Billing Technician I by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and may provide team leadership, training and work review for those at the entry-level. Positions may be filled by advancement from the Customer Service/Billing Technician I level upon fulfilling the required criteria (see above) or by recruiting an outside candidate with substantial administrative or clerical experience in public contact. Incumbents are expected to perform a wide variety of customer service and utility billing duties with only occasional instruction or assistance. Adequate performance

at this level requires the knowledge of departmental office procedures, precedents and the ability to choose among alternatives in solving many problems. A Customer Service/Billing Technician II is expected to work productively in the absence of a supervisor. Work is normally reviewed upon completion and for overall results. This class is distinguished from the Customer Service//Billing Supervisor in that the latter has overall responsibility for the Customer Service/Billing Department.

## **EXAMPLES OF DUTIES (Illustrative Only)**

- Responds to customer inquiries and complaints in person, by email, or by telephone, provides information, provides for the solution of problems, and represents the District to callers in a professional and customer friendly manner.
- Interprets policies and procedures and explains service fees, rates and procedures to customers; makes billing arrangements.
- Researches questions and complaints and follows up as required.
- Receives and processes service requests; sets up new accounts and prepares closing bills for canceled service.
- Operates computer billing system; processes field meter readings, identifying abnormal readings; sends out service requests for re-reads, leaks, or high usage; makes courtesy calls to customers with high usage and checks usage against prior month's usage; runs unread meter report; generates other reports; gets approval from supervisor and sends billing file to outside billing service for processing; prepares, audits, reviews and sends bills; maintains and reconciles a variety of customer billing records as directed.
- Receives customer payments by mail, check, cash, or credit card; processes mail payments, develops totals for cash drawer and check batches; takes in and distributes rebate forms; distributes and accepts appropriate forms; prepares bank deposit documents and end-of-day reports; scans documentation into computer system.
- Receives and dispatches work orders to field personnel, including service turn-ons, turn-offs and customer complaints.
- Prepares correspondence relating to customer service activities.
- Assists in the preparation of special reports related to customer billing.
- Performs general office support duties such as opening and routing mail, preparing correspondence, maintaining an inventory of office supplies and stationary, duplicating and distributing various written materials.
- May assist in the instruction and/or work review of less-experienced customer service staff.
- Performs other duties as assigned.

## QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to assist individuals with disabilities to perform the essential functions.

### Customer Service/Billing Technician I

#### **Knowledge of:**

- Standard office procedures, practices, and equipment
- Basic cash handling practices and recordkeeping
- Business arithmetic and statistical techniques
- Computer applications related to the work, including word processing spreadsheets and database applications and data entry
- Basic filing systems
- Receptionist duties, receive calls and visitors and direct them to appropriate person or department

#### **Skills:**

- Provide information and answer questions calmly in stressful situations
- Respond to and effectively prioritize multiple phone calls and other requests or interruptions
- Interpret, apply and explain policies and procedures
- Compose correspondence independently or from brief instructions
- Balance cash receipts
- Organize own work, set priorities and meet critical time deadlines
- Respond to customer inquiries and complaints in person or by telephone, provide information and solutions of billing issues, make billing arrangements, and represent the District in a professional and courteous manner

#### **Abilities:**

- Make accurate arithmetic, financial and statistical computations
- Receive customer payments in person or by mail; make change, issue receipts, balance cash, prepare deposit documents and end-of-day reports
- Use English effectively to communicate in person, over the telephone and in writing
- Exercise independent judgment and utilize initiative within established procedural guidelines
- Accurately establish, maintain and research files
- Organize own work, set priorities and meet critical time deadlines
- Provide information and answer questions calmly in stressful situations
- Establish and maintain effective working relationships and act in a courteous manner when interacting with the public, vendors, contractors and District staff in person and over the telephone
- Understand and follow written and oral instructions
- Communicate information and policies clearly and concisely, both verbally and in writing

## **Customer Service/Billing Technician II**

In addition to the duties, knowledge, skills and abilities required of the Customer Service Representative I:

- Prepares First Past Due Notices, Second Past Due Notices with late charges and 24-hour Shut Off Notices.
- Processes collections; runs monthly aging reports; tracks and sends first and second collection letters; telephones customers with past due accounts; resends bill statements, makes payment arrangements as needed, transfers balances from deleted accounts to active accounts; collects money; generates 24-hour door tags, as appropriate; refers delinquent accounts to collection agency for letter service or direct collections, as appropriate.
- Works closely with the Operations & Maintenance staff to maintain location of backflow devices; establishes service for newly installed meters including new construction.
- Handles appeals from customers to high water bills and determines whether a credit is appropriate and needs to be issued; prepares necessary correspondence to customers.
- May handle petty cash for the District.

### **Education and Experience:**

To qualify, a successful incumbent must possess both education and experience, which would provide the required knowledge and abilities. Experience may substitute for education. Minimum requirements to obtain the requisite knowledge and abilities are:

#### ***Customer Service/Billing Technician I***

Equivalent to high school graduate with one (1) year of experience in providing general office support, computer applications such as word processing and spreadsheets. Some customer service experience highly desirable.

#### ***Customer Service/Billing Technician II***

Equivalent to high school graduate supplemented by business school or college level coursework in business and computer applications with two (2) years of administrative/clerical experience in an office environment and intermediate Microsoft Office skills. Prior customer service experience is required.

#### ***Licenses or Certifications:***

None.

### **Physical Demands:**

Must possess mobility to work in a standard office setting including standing, walking, sitting, kneeling, stooping, reaching overhead and below waist level. Use of standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds.

**Environmental Elements:**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

***FLSA Status: Non-exempt, eligible for overtime***

***Bargaining Unit: MCWD Employees Association***