



CUSTOMER SERVICES REPRESENTATIVE 2 0503
CUSTOMER SERVICES REPRESENTATIVE 1 0514

NATURE OF THE WORK

The customer service representative series is comprised of field and office work regarding the accurate reading of water meters, and the servicing of customers and their utility accounts. For utility billings, customers include City of Salem commercial, multi-family, residential, wholesale, and industrial water and sewer customers. For field services, customers served include City of Salem commercial, multi-family and residential occupants. All positions in the series require customer contact. Duties often include speaking with angry or upset customers to effectively respond to their concerns.

The Customer Services Representative 1 is distinguished from the Customer Services Representative 2 level by primary responsibility for meter reading and tasks related to ensuring accuracy of readings. The Customer Services Representative 2 is characterized by office work primarily in servicing customer utility accounts, and by field work primarily in servicing meters, and effectively handling customer concerns related to field service issues.

EXAMPLES OF ESSENTIAL DUTIES

Customer Services Representative 2 - Field

- ◆ Prioritize hard copy work going out to the field; develop route documentation; answer office staff questions concerning field documentation; assist with other work include retrieving cash receipts from satellite locations and delivering to finance department.
- ◆ Turn water on and turn off as requested; inspect for possible leaks; determine if leaks are repairable by customer service; inform customers regarding leaks and possible solutions; for customer side leaks, refer customers to office staff regarding leak adjustments or billing concerns; obtain special water meter reads as requested; inform customers of conservation alternatives; deliver forty-eight hour shut off notice for non payment, using good judgement to either disconnect utility services or make additional credit arrangements; show customers the location of their water meter boxes as requested; investigate theft of water notifications
- ◆ Collect utility fees at the door after forty eight hour shut off notice has been delivered and the balance still remains unpaid; use tact and good communication skills if the customer becomes angry or confrontational; create an atmosphere of voluntary compliance on the customer's behalf.
- ◆ Remove/install water meters as requested; replace water meter box covers and water meter box lids as necessary; follow up on customer calls initiated through dispatch; investigate low or zero water consumption accounts at meter location; research water pressure concerns as requested by customer; refer customer field concerns to proper agency or department.
- ◆ Complete documentation to support accurate billing and reporting such as inspection reports, customer request paperwork from dispatch including resolution achieved, water meter change out paperwork, appropriate notes on collection documentation, low or zero consumption accounts, field portion of using water notifications, vehicle inspection forms, and daily service report of activity type and volume of work.

Customer Services Representative 2 – Office

- ◆ Verify hard copy reports with computer balance for routes processed; edit hard copy printouts for abnormal meter reading and request additional investigation on high or low consumption; process water turn ons and turn offs; investigate outstanding accounts with questionable history; initiate work orders to the field representative for special meter reads; input any corrections from editing process into utility billing system; generate using water notification for field representatives; set up and initiate computer billing process; initiate and process final and additional billings; enter meter changes from field representatives

and from meter shop into utility billing system; initiate and process special billings per predetermined schedule into utility billing system; initiate and process industrial sewer billings; provide special spreadsheets as required; initiate and process wholesale account calculations and billings into utility billing system; verify treatment plant metal testing report, initiate appropriate adjustment and process billing; initiate and process sewer only accounts using predetermined consumption amount into utility billing system

- ◆ Reconcile hard copy printouts to computer balance, additional and final bills; manually verify consumption report generated by data center; create suspense and distribute to other customer service staff; manually file hard copy monthly reports in archives; manually review those bills that required special account processing
- ◆ Working closely with field staff, prepare the water turns on and turn off orders for the field staff; verify forty eight hour shut notices before they are routed to field staff; generate a new account sign up; prepare cash receipts for delivery to finance department; provide and maintain spreadsheets on the activity and volume of work for each field representative; produce daily availability schedule of staff; verify and process payments received after hours; daily verify payments received and notify field staff to discontinue collection process; notify field representatives of special water turn on and turn off orders throughout the day; contact field representative for special reads needed for billing purposes; coordinate customer inspections with field representatives
- ◆ Set up and close customer water and sewer accounts; respond to customer inquiries on when their water meters will be read; enter updated master account information into utility billing system; make credit arrangements and note on the customer account in the utility billing system; provide information on agencies and organizations that offer financial assistance; explain City of Salem water and sewer rate structure; initiate field inspections when consumption goes up or down for no apparent reason; provide information on leak adjustments and calculations; provide information on certification process of sewer only accounts that are done semiannually; provide meter box location upon request by customer; provide information to the customer on water meter size and the policy for changing the size of their water meters; initiate, process and maintain automatic bill pay; initiate, process and maintain senior and disabled discount program information; fax account information as requested by customer; review rental agreements on questionable accounts; provide information on meter size, tap size and pressure as requested
- ◆ Note credit arrangements and customer discussions on a message screen in the utility billing system; file all hard copy documentation; initiate and process journal vouchers showing documentation for the amount of the adjustment; initiate and process duplicate bill; document and report uncollectible accounts to a collection agency; prepare water meter reading and account delinquency calendars; initiate and process paperwork for bankruptcies and note information on customer account in utility billing system; notify all other internal departments of bankruptcies; access marion county tax assessor files for owner information; initiate and process billings for nsf checks, and other charges; set up new water and sewer account information provided by permit center; accurately input information on all meter changes into utility billing system; send letters to customers as appropriate; initiate and process semiannual certification of the sewer only accounts; input base consumption information provided by other water districts within the City of Salem; provide water rate comparisons and other water and sewer related information in spreadsheet form to finance and other internal departments upon request; coordinate with data center on computer issues and concerns; perform special field inspections to resolve account concerns as necessary

Customer Services Representative 1

- ◆ Research and resolve those customer account readings that are outside the normal limit determined by using historical consumption ranges; determine if the meter is dead, house or business is vacant, vacated temporarily, under construction or being remodeled; determine if meter equipment has been vandalized, meter box is flooded, or frozen; report covered meter boxes or theft of water meter for further investigation
- ◆ Determine maintenance problem and resolve where meter box location is obstructed not allowing meter to be read; report broken meter boxes, meter box lids that need replacement, or leak detection for the purpose of further inspection

- ◆ Visit site to determine the accuracy of account information that resides in the utility billing data base; obtain corrected information to be entered into the utility billing data base; provide new meter numbers, touch read register numbers, switched meter numbers, meter location, information on missing accounts and address corrections
- ◆ Visit site of sewer only customers to educate the customer regarding a sewer only service, and obtain residential history and customer information for sewer billing
- ◆ Review meter reading routes and reroute existing routes to facilitate ease of reading; organize and route new subdivisions into existing routes or create new routes; set up new routing for routes using new radio/computer technology
- ◆ Review water tap permits to assign account number and route sequence number through computer data search, and check for duplicate account numbers; review and enter information for each tap onto city plot maps; enter tap data into the route management system

WORK QUALIFICATIONS

Graduation from high school; or any equivalent combination of experience and training that provides the knowledge and abilities noted below.

Special licenses or certifications: some positions may require an Oregon Driver's License, Class C and the ability to meet City driving standards

Knowledge of	CUSTOMER SERVICES REP	
	1	2
◆ Material, methods, techniques, and tools used in the plumbing trade	Some	Moderate
◆ Customer service principles	Some	Considerable
◆ City of Salem street geography	Moderate	Moderate
◆ Utility billing procedures	-	Moderate
◆ Materials and techniques of the plumbing trade	-	Moderate
◆ Water and sewer utility systems	-	Moderate
◆ Walk a route of considerable distance under varying weather conditions	Moderate	-
◆ Make and record arithmetic computations rapidly and accurately	Moderate	Considerable
◆ Read different types of water meters and accurately enter data into hand help computer	Moderate	-
◆ Maintain records and prepare reports	Moderate	Moderate
◆ Use standard tools of the plumbing trade to turn water on/off, and to perform repairs or replacement of water meters	-	Moderate

Ability to	Customer Service Rep	
	1	2
◆ Speak and write effectively	Moderate	Moderate
◆ Convey information to customer in a manner that is easy to	Moderate	Moderate

	Customer Service Rep	
understand		
◆ Provide accurate information to customers to resolve their concerns in a professional manner	Moderate	Considerable
◆ Follow oral and written instructions	Moderate	Considerable
◆ Record written documentation legibly regarding field activities	Considerable	Considerable
◆ Interpret, apply and enforce policies fairly	Moderate	Moderate
◆ Prioritize assignments to efficiently cover assigned area	Moderate	Moderate
◆ Use personal computers and other office equipment	Moderate	Moderate
◆ Walk a route of considerable distance under varying weather conditions	Moderate	Moderate
◆ Make and record arithmetic computations rapidly and accurately	Moderate	Considerable
◆ Read different types of water meters and accurately enter data into hand help computer	Moderate	-
◆ Maintain records and prepare reports	Moderate	Moderate
◆ Use standard tools of the plumbing trade to turn water on, water off and to perform repairs or replacement of water meters.	-	Moderate

Working Conditions:

All employees are expected to maintain regular job attendance and adhere to working hours set by the supervisor. The use of official leaves (approved sick, vacation, and leave without pay) is granted only upon authorization by the immediate supervisor or by the supervisor's designated representative. Use of official leaves are to be kept to reasonable levels as set by the supervisor in terms of the unique character and needs of the work unit.

Work is performed in an both an office and field setting. Positions may require bending, stooping, kneeling, and lifting in all types of weather. Field work may include public contact as well as working near traffic with accompanying noise and fumes.

Personnel Director

6/2001: Revision and title change of Utility Services Rep and consolidation with Water Services Rep to Customer Services Rep 2, and revision and title change of Meter Reader to Customer Services Rep 1.