



CITY OF CITRUS HEIGHTS

CUSTOMER SERVICE REPRESENTATIVE

DEFINITION

Performs a variety of record keeping, general clerical, transaction processing, and customer service work, both over the phone and in-person. Responsible for receiving and responding to public inquiries. Supports the administrative, clerical, and other activities of the department assigned.

DISTINGUISHING CHARACTERISTICS

This class is a journey-level class. The Customer Service Representative class is distinguished from that of a technician level class, by performing the more routine clerical and administrative duties in support of the department assigned. Whereas a Technician is responsible for performing the more complex duties for an assigned department.

SUPERVISION RECEIVED AND EXERCISED

- Receives general supervision from assigned supervisory or management personnel.
- Lead direction may be provided by higher-level department specific staff.
- Exercises no direct supervision over staff.

EXAMPLES OF DUTIES - Duties may include, but are not limited to, the following:

- Performs a variety of office support duties such as typing, proofreading, billing, checking, filing, record keeping, cashiering, reconciliation, permit processing, and customer service.
- Gathers information from a variety of sources for the completion and processing of forms, records, applications, etc.; contacts individuals to obtain additional information.
- Prepares, compiles, tabulates and maintains data including databases, various documents, statistical and programmatic operational reports and records for a variety of programs as requested; processes contracts, agreements, claims, ordinances and resolutions as assigned; tracks and monitors city contracts for proper insurance requirements and relevancy, communicates with departments and vendors regarding status and requests for additional information; communicates contract and insurance requirements; maintains citywide contracts database; drafts outreach, marketing, educational and related communication materials; and develops and updates City web pages.
- Proofreads and checks typed and other material for accuracy, completeness, compliance with departmental policies; and corrects English usage, including grammar, punctuation, and spelling.
- Enters, edits, and retrieves data, and prepares periodic or special reports from an on-line or personal computer system following established formats and menus; creates report formats using programmed software to meet programmatic needs.
- Performs related duties as assigned.

When assigned to Administrative Services Department

- Perform cashiering duties; accepting payments at front counter, processing payments received by mail or ACH, coordinate with City departments to obtain documentation to complete transaction, complete bus pass transactions and reconciliation, reconcile cash drawer daily and post transaction to the General Ledger.
- Post electronic deposits to bank.
- Reconcile deposits for City deposits, including Community Center deposits.

- Provide backup support for Accounts Payable and Accounts Receivable.
- Maintain Finance/Human Resources Division records and retention schedule.
- Respond to inquiries regarding employment at Citrus Heights both over the phone, and in person.
- Perform confidential filing
- Other duties as required.

When assigned to Community Development Department

- Print renewal notices and/or copies of business license for Citrus Heights' businesses.
- Call business within Citrus Heights to notify of expired business license.
- Assist with business license inquiries both in person and/or over the phone.
- Serve as a liaison between property owners, businesses, City staff regarding programs and activities of the department.
- Read and interpret basic plans, documents, maps, business licensing and permit applications.
- Other duties as required.

When assigned to City Manager's Office

- Provide assistance to Public Records requests.
- Serve as a liaison between the public, City Council, and City staff regarding programs and activities of the department.
- Receive and respond to public inquiries; includes providing back up support as receptionist/assisting other front counter staff members.
- Maintain records, retention schedule, and filing.
- Preparation for City Council meetings; posting of Council agenda, prepare conference room and chambers, sending out City staff meetings.
- Other duties as required.

When assigned to General Services Department

- Perform transactional processing for encroachment permits.
- Respond to service requests both over the phone, and in person.
- Serve as a liaison between the public and City staff, regarding programs and activities of the department.
- Other duties as required.

MINIMUM QUALIFICATIONS

Knowledge of:

- City and assigned department programs, goals, and policies and procedures.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Basic clerical and recordkeeping principles and practices.
- Principles of budget monitoring, business arithmetic, including percentages and decimals.
- Business letter writing and the standard format for typed materials.
- Legal documents, forms, and terminology.
- Methods of preparing and processing various records, reports, forms, and other documents particular to assigned department or program.

- Operation, adjustment, and minor maintenance of a variety of photo reproduction, microfilming, micro imaging, and imaging equipment.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and City staff.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs to conduct, compile, and/or generate documentation relevant to the assigned program area.

Ability to:

- Compose routine correspondence, and maintain records and databases.
- Perform specialized processes, procedures, and office support tasks related to the division/department assigned.
- Perform detailed office support work accurately; organize and maintain accurate files and records; and compose routine correspondence from brief instructions.
- Make accurate arithmetic calculations.
- Read and interpret basic plans, documents, maps, business licensing and permit applications.
- Operate, adjust, utilize, and perform minor maintenance to imaging scanners and personal computers, photo reproduction, microfilming, and various micro imaging equipment.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Deal tactfully and effectively with persons contacted in the course of work, including those of diverse socioeconomic and cultural backgrounds.
- Understand, interpret, and apply pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and the County in meetings with community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Use principles of effective office safety including use of equipment in a proper and safe manner, use of preventative personal ergonomic techniques, and maintenance of safe housekeeping in personal and common workspaces.
- Provide high quality, economical services to the Citrus Heights community, placing emphasis on responsive customer service.

Experience and Training:

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:

One year of increasingly responsible clerical and/or customer service experience.

Training:

Equivalent to the completion of the twelfth grade.

Coursework in Business Administration, Economics, Accounting, Human Resources, or a related field is highly desirable.

License or Certificate:

May need to possess a valid California driver's license and proof of automobile liability insurance as required by the position.

PHYSICAL/SENSORY REQUIREMENTS

On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, and write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

File:	Customer Service Representative
FLSA:	Non-exempt
Created:	05/11/2023
Revised:	