

**Phelan Piñon Hills Community Services District**  
**Job Description**

JOB TITLE: Customer Service Supervisor (CSS)

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EXEMPT: No  
DEPARTMENT: Administration  
REPORTS TO: General Manager

SALARY LEVEL: 24  
APPROVED: 9/23/2022

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**SUMMARY:**

Under direction of the General Manager, the Customer Service Supervisor supervises customer service functions and performs billing functions, clerical and administrative support functions, delinquent accounts functions, meter-related administration, and accounts receivable functions. The Customer Service Supervisor works independently and performs complex tasks and decision making related to customer service. Management staff will assign some or all of the essential and secondary duties listed below as deemed appropriate and necessary.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** (Responsibilities and duties may include, but are not limited to, the following)

**Supervisory:**

- Demonstration of continuous effort to improve administrative operations, streamline work processes, and work cooperatively and jointly with other staff to provide quality customer service and establish effective customer relations.
- Independently performs all supervisory duties for assigned staff, including evaluating personnel, directing assignments, conducting disciplinary actions, and monitoring and assigning developmental activities.
- Provides day-to-day leadership to ensure a high performance, customer-service oriented work environment that supports achieving the District's mission, objectives, and values.
- Prioritizes, assigns, evaluates, and supervises the work of all assigned, administrative customer service personnel.
- Provides coaching and guidance for performance improvement and development; directs and oversees the training of new customer service personnel.
- Plans and implements work programs and customer service activities; modifies departmental procedures and processes; creates quality assurance tools to ensure completion, quality, and timeliness.
- Conducts formal performance appraisals, participates in a variety of personnel actions, such as hiring, counseling, training, promotion, discipline, and termination.
- Assumes difficult and specialized customer service situations involving upset and dissatisfied customer and requiring sensitivity and sound judgement; takes action to resolve complaints where appropriate, including waiving of delinquency charges, deposits, and late charges; preparing payment

agreements; receiving and responding to correspondence, telephone calls, and other methods for receiving customer requests and/or complaints.

- Attends and participates in professional group meetings; stays informed of new trends and innovations in customer service; directs and participates in the incorporation of new developments into program areas, as appropriate.
- Assists and participates in the development and administration of the departmental budget.
- Oversees daily processing of customer payments and receipts; ensures daily reconciliation of cash registers and online credit card and other payment methods; ensures proper documentation for deposit transfers and refunds.
- Regularly reviews related District policies and procedures, recommends policy changes to management, and updates assigned staff with any changes to District policies and procedures.
- Performs related duties and responsibilities as assigned.

**Administrative:**

- Responds to customer requests in person or by telephone, website, mail, e-mail, or fax to initiate, change, or close service accounts; explains billing practices and rates; processes turn-on and turn-off requests, new and transfer accounts, and service orders.
- Generates service orders for field staff and makes a record of fieldwork completed.
- Answers and directs calls to appropriate District staff; answers a broad range of general information questions about District programs, policies, and procedures.
- Prepares and posts account service, comment, and payment data to customer records by computer.
- Types and/or drafts a wide variety of administrative, memorandum, financial, technical documents and reports from drafts, notes, dictations, or brief oral instructions using word processing software; proofreads or independently composes correspondence and reports related to assigned area of responsibility.
- Performs administrative activities of routine and moderate difficulty in support of various departments, which may include developing and updating a variety of databases and ability to perform complex mailing distributions.
- Operates a variety of office equipment including copier, fax machine, adding machine, postage meter, and scanner; utilizes various computer applications and software packages; maintains and generates reports.
- Reads, understands, and ensures compliance with the District's safety policies; attends safety meeting as required; reports all accidents, violations, or infractions to supervisor.
- Participates in cross-training and provides backup to other department staff.
- Regular attendance at worksite.

**SECONDARY DUTIES AND RESPONSIBILITIES:** (Responsibilities include, but are not limited to)

- Maintains records of past due customer accounts; prepares delinquent bill reminders and past due notices; sets dates for shut-off for non-payment; processes NSF checks and refers delinquent accounts to collection agency in accordance with established District policy; reverses late fees and delinquent processing charges within authority levels and when warranted by the circumstances.
- Downloads and uploads information from meter reading devices into computer database and processes related reports.
- Generates and prepares billing statements, including delinquent bills and closing bills, for mailing; reviews, analyzes and verifies preliminary billing ledger reports prior to processing bills.
- Prepares disconnection list and processes disconnection service orders, lists & reports, and makes adjustments to accounts for applicable fees; prepares and mails letters to customers regarding delinquent accounts; follows up on delinquent customers and accounts that have been disconnected; follows up on letters in effort to make collections, prepares and files liens with the County.
- Responds to correspondence from customers, developers, etc. in relation to meter set requirements; receives will serve requests, drafts water permits and logs meter install; compiles copy of permits; sets up new meter accounts in Tyler.
- Prepares invoices for damage to infrastructure; prepares invoices for maps and other miscellaneous charges.
- Prepares monthly reports regarding prepaid fees, meter connections, billing registers, customer adjustments, and all other billing related month-end reporting functions; verifies all accounts are in balance; reports discrepancies and makes adjustments within the policy set forth.
- Runs reports on accounts that have liens, tracks liens in spreadsheets and maintains lien release records, prepares and submits lien releases to County.
- Reviews and prepares standby assessments for public hearings and submission to County for inclusion on tax rolls.
- Reviews and prepares delinquent accounts for public hearings and submission to County for inclusion on tax rolls.
- Performs a wide variety of clerical tasks, including typing letters, memos, data entry, maintaining files, scanning files, picking-up and dropping off mail at post office, and sorting mail for distribution to District personnel.
- Orders and maintains supplies for the office, and prepares requisitions for miscellaneous items as assigned and in adherence with District's purchasing policy.
- Performs a wide variety of responsible administrative and secretarial duties for management, supervisory staff, and other division staff as assigned; attends to a variety of administrative details to ensure smooth operations of the assigned department of division in serving its customers.
- Verifies deposit, as prepared for the bank.
- Performs related duties and responsibilities as required.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

- Possession of, and the ability to maintain, a valid California Driver's License with a satisfactory driving record is required.
- Possession of, and the ability to maintain, current driver's insurance is required.

**EDUCATION AND/OR EXPERIENCE:**

- Bachelor's degree from an accredited college or university with major coursework in business administration, customer service, office related functions, or a related field.
- Three (3) years of increasingly responsible related experience.
- Completion of, or ability to complete within one year of appointment, a District approved program of instruction or certification acceptable to the District in leadership, supervision, and customer service.
- Experience in customer service functions in a public utility.

**QUALIFICATION REQUIREMENTS:**

The requirements listed below are representative of the knowledge, skill and/or ability required.

**KNOWLEDGE OF:**

- Customer service practices and customer-oriented telephone etiquette.
- District rules and regulations and issues related to assigned functions.
- District personnel rules and policies.
- Office administrative procedures and methods.
- Cash, check and credit card handling techniques.
- Principles and methods of business correspondence, recordkeeping and filing.
- Principles and practices of sound business communications and correct English use, including spelling, grammar and punctuation.
- Appropriate safety precautions, procedures, practices and regulations related to maintain a department safety program, safe working conditions, and operating equipment.
- Modern office equipment, software programs, and computerized record keeping and filing methods.
- General business mathematics and calculations.
- Principles and practices of effective leadership and employee supervision, including training and performance evaluation.
- Principles and practices of budget monitoring.
- Pertinent local, State and Federal laws, ordinances and rules.

**ABILITY TO:**

- Supervise, assign, inspect and evaluate the work of others.
- Communicate effectively, both verbally and in written formats.
- Motivate and evaluate staff and provide for their training and development.
- Develop and implement work standards.
- Plan and organize work to meet changing priorities and deadlines.

- Analyze and resolve complex customer service problems.
- Exercise independent judgment and initiative.
- Train and orient new and existing employees.
- Perform general maintenance and review of customer accounts.
- Analyze, interpret, and explain District policies to customers, and deal with them in a tactful and courteous manner.
- Maintain and direct the daily activities such as service orders, phones, counter, reception, and any departmental duties.
- Establish and maintain cooperative working relationships with those contacted in the course of work.
- Establish and prioritize action items and multitask effectively.
- Prepares concise records, reports, and other written materials.
- Use creative thought to problem solve including the use of new and innovative technologies and techniques.
- Participate in groups and committees that affect District operations, policies, and procedures.
- Use Microsoft Outlook including accessing forms within public folders, send and receive email and use the calendar and scheduling functions effectively.
- Maintain physical condition appropriate to the performance of assigned duties and responsibilities.
- Maintain mental capacity, which allows the capability of making sound decisions and demonstrate intellectual capabilities.
- Maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading, writing, and operating assigned equipment.
- Assist in the development and monitoring of an assigned program budget.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Proficiency and competency of the knowledge and abilities cited above with the ability to work independently in absence of direct supervision.

**TYPICAL PHYSICAL DEMANDS:**

The physical activities described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- On a continuous basis, sit at a desk and in meetings for long periods of time.
- Use a computer for long periods of time.
- Write or use keyboard to communicate through written means.
- Perform simple grasping and fine manipulation of objects.
- Travel occasionally by automobile in conducting District business.
- Occasionally travel by airplane in conducting District business.
- Regularly required use of hands to finger, handle, or feel objects, tools, or controls; reach with hands and arms; and talk or hear.
- The employee is frequently required to sit.
- Occasionally required to stand, walk, stoop, kneel, crouch or crawl.

- Must regularly lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds.