



**TOWN OF DISCOVERY BAY**  
*A COMMUNITY SERVICES DISTRICT*

**OFFICE ASSISTANT /  
 CUSTOMER SERVICE REPRESENTATIVE B**

**HOURLY \$24.46 – \$27.68**  
**ANNUAL \$50,887 – \$57,573**

FLSA Designation	Non-Exempt
Established	July 2016
Revised	July 2021
Classification	200: Non-Management
Range	230

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

**DEPARTMENT / DIVISION** As assigned

**SUMMARY DESCRIPTION**

Under general supervision of the Finance Manager, performs a variety of responsible office support duties related to the provision of services to Town residents including the establishment and maintenance of customer accounts for utility services; provides a variety of administrative office support activities, including telephone and front desk reception, word processing, record-keeping, database maintenance, and report preparation. Exercises no supervision of staff.

**IDENTIFYING CHARACTERISTICS**

Office Assistant / Customer Service Representative B - This is the journey-level classification responsible for performing a variety of customer service and office support duties related to utility billing, service requests, payments processing, delinquent accounts, and account reconciliation. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise. Incumbents carry out recurring assignments independently without specific instruction, but refer deviations, problems, and unfamiliar situations not covered by instructions and procedures to the Finance Manager for decision or help. Work fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise and new assignments are reviewed more frequently. Positions in this class series are flexibly staffed and are generally filled by advancement from the “A” level, or when filled from the outside, require prior experience. Advancement to the “B” level is based on management judgment and/or certification or testing that validates the performance of the full range of job duties. This class is distinguished from the Administrative Assistant in that the latter performs more advanced technical and specialized administrative support duties requiring additional training and/or experience.

## **REPRESENTATIVE DUTIES**

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

1. Receives and screens visitors and telephone calls; takes messages, directs the caller to the proper staff, and/or provides factual information or problem resolution regarding Town and departmental activities and functions that requires the application and explanation of rules, policies, and procedures.
2. Responds to customer inquiries and complaints and provides information; provides for the resolution of unusual billing and customer account situations by conducting appropriate research; and represents the District to callers and visitors in a professional and customer friendly manner.
3. Interprets policies and procedures and explains service fees, rates, and procedures to customers; may waive fees under appropriate circumstances and with supervisory approval.
4. Operates computer billing systems; edits, prepares, and sends bills; maintains and reconciles a variety of customer billing records; estimates proper billing amounts and makes appropriate adjustments ensuring proper billing codes.
5. Receives and processes service requests, sets up new accounts, determines and collects necessary charges and secures legal documents regarding property descriptions and ownership.
6. Makes billing arrangements for new accounts and prepares closing bills for cancelled service.
7. Receives and processes customer payments; balances cash receipts, processes mail payments, reconciles billing and cash management reports, and prepares deposit documents.
8. Runs reports on status of accounts including delinquent accounts; sends delinquency notices; coordinates with field staff to leave door hangers and to shut-off or turn-on service as appropriate.
9. Performs a wide variety of responsible office support duties including processing work orders, filing, preparing records and monthly reports, processing plans, and creating project files.
10. Maintains accurate and detailed records, verifies accuracy of information, researches discrepancies, and records information.
11. Verifies and reviews forms and reports for completeness and conformance with established regulations and procedures; applies Town policies and procedures in determining completeness of applications, records, and files.
12. Composes, types, formats, and proofreads a wide variety of reports, letters, and other documents; checks drafts for punctuation, spelling, and grammar; suggests corrections.
13. Compiles information and data for administrative, statistical, and financial reports; checks data; prepares and assembles reports and other informational materials.

14. Maintains and updates departmental record systems and specialized databases; enters and updates information with departmental activity and report summaries.
15. Gathers, assembles, updates, and distributes a variety of Town specific information, forms, records, and data as requested.
16. Acts as a Town representative within community groups to relay or obtain relevant information regarding Town activities.
17. Performs other duties as assigned.

## **QUALIFICATIONS**

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

### **Knowledge of:**

Modern office practices, methods, and equipment and computer applications related to work, including telephone and word processing and spreadsheet software. Business arithmetic techniques. Business letter writing and the standard format for reports and correspondence. Principles and practices of data collection and report preparation. Record keeping principles and procedures. English usage, grammar, spelling, vocabulary, and punctuation. Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and Town staff.

### **Ability to:**

Deal tactfully with the public and others in providing information, answering questions, and providing customer service. Respond to and effectively prioritize multiple phone calls and other requests for service. Perform responsible customer service and office support work with accuracy, speed, and general supervision. Learn and understand the organization and operation of the Town as necessary to assume assigned responsibilities. Learn, interpret, apply, and explain Town policies and procedures. Make accurate mathematical computations. Compose correspondence independently or from brief instructions. Research, compile, and summarize data and prepare accurate reports.

Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work. Establish and maintain a variety of filing, record-keeping, and tracking systems. Organize own work, set priorities, and meet critical time deadlines. Operate modern office equipment including computer equipment and specialized software applications programs. Use English effectively to communicate in person, over the telephone, and in writing. 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.

**EDUCATION AND EXPERIENCE:**

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

Office Assistant / Customer Service Representative B - Equivalent to the completion of the twelfth (12<sup>th</sup>) grade and three (3) year of experience in customer service, maintaining financial and accounting records, and/or providing office support.

**License:**

Possession of, or ability to obtain, an appropriate driver's license may be required for some positions.

**PHYSICAL DEMANDS AND WORKING ENVIRONMENT**

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

**Environment:** Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, and the public in providing customer service, explaining Town policies and procedures, and requesting and providing information.

**Physical:** Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and 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, typewriter 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 up to 25 pounds.

**Vision:** See in the normal visual range with or without correction.

**Hearing:** Hear in the normal audio range with or without correction.

**Note:** All employees of the Town of Discovery Bay Community Services District are designated by state law to be "Disaster Service Workers." In the event of a declared emergency or any undeclared emergency or natural disaster that threatens the life, health and/or safety of the public, employees may be assigned to assist rescue and relief workers. Such assignments may be in locations, during hours and performing work significantly different from the employees' normal work assignments and may continue through the recovery phase of the emergency.