



JOB DESCRIPTION

CUSTOMER SERVICE & FIELD OPERATIONS REPRESENTATIVE

Date: July 27, 2026

Reports to: Customer Service & Accounting Supervisor

FLSA: Non- Exempt

Salary Range: CSI

DEFINITION

Under the direction of the Customer Service & Accounting Supervisor, performs a variety of customer service, clerical, field service, and operational support duties related to the District's water utility operations. Responsibilities include providing customer service, processing customer payments, establishing and maintaining customer accounts, preparing and completing customer service field work orders, performing customer service field activities, maintaining customer and meter records, supporting inventory, compliance, and development programs, and serving as a liaison between customers and District staff to ensure efficient, accurate, and professional service delivery

ESSENTIAL FUNCTIONS

Customer Service

- Answer customer calls, receive payments, and greet office visitors while providing information regarding District services, billing, water conservation, and District policies.
- Establish, transfer, discontinue, and maintain customer water service accounts.
- Receive and process customer payments.
- Respond to customer inquiries regarding billing, water usage, water pressure, water quality, service interruptions, and District policies.
- Schedule customer appointments for field service requests and meter-related work.
- Prepare correspondence, notices, and other customer communications.
- Follow up with customers to ensure timely resolution of service requests and concerns.
- Prepare, organize, prioritize, and complete customer service field work orders.
- Monitor the status of open customer service work orders and ensure timely completion.
- Process customer-generated service requests related to customer accounts and field services.
- Read, verify and record water meter readings for billing, customers service, and operational purposes.
- Perform customer service field activities, including service turn-ons and turn-offs, meter rereads, site inspections, customer notifications, field investigations, and other customer service field requests.

- Perform and support meter-related activities, including meter change-outs, lid replacements, antenna replacements, meter inspections, and verification of meter information.
- Enter, verify, and maintain meter reading information, customer account records, and related field documentation.
- Review exception reports and investigate discrepancies involving meter readings, customer accounts, and high water use concerns.
- Update customer accounts, billing, and utility software records, as applicable.
- Maintain accurate records of field activities, service orders, customer account changes, and operational reports.
- Perform other customer service and field support duties as assigned.

Inventory & Operational Support

- Maintain inventory records for District materials, meters, meter components, and related equipment.
- Receive, track, reconcile, and document inventory items utilizing the District's inventory management system.
- Assist with periodic physical inventory counts and inventory reconciliation.

Compliance & Program Support

- Assist with the administration of District compliance and customer service programs, including customer notifications, recordkeeping, scheduling, and follow-up activities.
- Support regulatory compliance efforts by maintaining accurate records and coordinating customer communications.
- Assist with backflow prevention, Lead and Copper Rule, and other regulatory or operational programs as assigned.

Development & Project Support

- Assist with new service installations, development projects, and related customer account activities.
- Assist with project documentation, work orders, customer account setup, and project closeout activities.

General

- Perform data entry utilizing District software applications.
- Maintain customer account records, files, and related documentation.
- Proofread documents for accuracy.
- Establish and maintain cooperative working relationships with co-workers, outside agencies, and the public.
- Perform duties in a professional manner and work effectively in a team environment.
- Maintain regular attendance and adherence to the prescribed work schedule.
- Perform related duties as assigned.

OTHER DUTIES

- Performs related duties as assigned.

JOB STANDARDS/SPECIFICATIONS

Knowledge of:

- Principles of customer service and customer relations.
- District organization, functions, policies, and procedures.
- Modern office practices, equipment, and procedures.
- Business correspondence and filing systems.
- Personal computer operation and related software applications, including Microsoft Office, email, and web-based communication tools.
- Basic mathematics.
- Correct English usage, spelling, grammar, and punctuation.
- Water utility customer service practices.
- Basic knowledge of water distribution systems, meter operations, and field service procedures.
- Principles of work order management, recordkeeping, and documentation.

Ability to:

- Operate a personal computer, business office equipment, and District software applications.
- Perform accurate data entry and maintain detailed customer and operational records.
- Read, interpret, and process work orders and utility maps.
- Prioritize multiple assignments while meeting deadlines.
- Communicate effectively, both orally and in writing.
- Deal tactfully and courteously with customers and the public.
- Follow oral and written instructions.
- Work independently with minimal supervision.
- Perform field investigations and inspections related to customer service activities.
- Establish and maintain effective working relationships with District staff, outside agencies, and the public

TYPICAL PHYSICAL ACTIVITIES

- Work in both office and outdoor field environments.
- Sit, stand, walk, bend, stoop, kneel, reach, climb, and lift objects weighing up to 30 pounds.
- Operate office equipment including computers, copiers, telephones, and printers.
- Operate District vehicles while performing field assignments.
- Regularly communicate with customers and District staff in person and by telephone.
- Walk over uneven terrain while conducting field inspections and customer service activities.
- Hearing and vision within normal ranges, with or without correction.

ENVIRONMENTAL FACTORS

- Exposure to sun: 10% or less work time spent outside a building and exposed to the sun.

- Occasionally required to change working hours or work overtime.

DESIRABLE QUALIFICATIONS

Any combination of education and experience that would likely provide the necessary knowledge and abilities is qualifying.

A typical way to obtain the knowledge and abilities would be:

Education: High School graduation, or satisfactory equivalent.

Experience: Experience performing customer service, meter reading, field service, water utility operations, or related public utility work is desirable.

LICENSE CERTIFICATE REGISTRATION REQUIREMENTS

Possession of a valid California Class C Driver License may be required at the time of appointment.

Possession of, or the ability to obtain, a Grade D-2 Water Distribution Operator Certificate issued by the California State Water Resources Control Board is desirable.

Failure to obtain or maintain such required license(s) may be cause for disciplinary action.

I have reviewed the job description for Customer Service & Field Operations Representative with the General Manager and agree with its contents.

Employee Signature

Date

General Manager Signature

Date

The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria necessary to successfully perform the job.