

CUSTOMER SERVICE REPRESENTATIVE POSITION DESCRIPTION

I. Objective:

Primarily responsible for payment processing and cash balancing functions. Actively involved with member billing inquiries and provides front-desk reception and telephone support. Provides assistance with maintenance of customer information, billing, capital credits, collections, general bookkeeping and office duties. Assists with information technology projects and able to troubleshoot software and hardware issues.

II. Reporting Relationship:

Reports to: CFO/Office Manager

Works with: Accountants, customer service representative, and department managers

III. Responsibilities:

A. Cashiering and office functions

1. Opens daily mail and posts payments. Prepares payment stubs if applicable. Scans checks into remote deposit.
2. Processes over-the-counter, telephone payments, incoming ACH and miscellaneous receipts.
3. Assists with posting of payment portal batches and review of reconciling items.
4. Prepares and submits ACH and credit card batches.
5. Posts and groups batches into a deposit. Completes daily balancing processes for cash and accounts receivable.
6. Cashes out and balances cash register on a rotating basis.
7. Prepares weekly bank deposit on a rotating basis.
8. Shreds remote deposit checks according to purging schedule.
9. Backs-up office closing procedures and handles payments in the drop-box.
10. Performs scanning and filing of service orders, billing related Documentation, invoices and other documents as needed.
11. Assists other departments with tasks when assigned.

B. Customer service functions

1. Provide front-desk reception. Meet and welcome members and visitors, directing to proper department. Follow security procedures.
2. Shares phone reception duties with executive secretary as needed.
3. Answers incoming calls and addresses member questions and concerns or directs to appropriate staff. Possess knowledge of Federated programs including CTV, capital credits, budget billing, etc. to address limited member questions.
4. Assists members with log-in issues on member portal.

5. Creates service orders for security lights and maintenance work as needed.
6. Assists with outages by answering calls and entering tickets into the outage management system. Includes working during emergency situations as needed.
7. Promotes cooperative principles and ensures sound member relations.

C. Assists with maintenance of customer information systems (CIS)

1. Accurately obtains demographic and billing information for new member accounts and new services. Determines deposits in accordance with cooperative policies. Verbally communicates billing policies to new members and sends out membership information.
2. Processes read-ins and read-outs related to member moves, reconnections, and disconnections. Obtains final address billing information.
3. Promotes and enrolls members in automated payment and paperless billing options.
4. Updates member and landlord contact information upon notification.
5. Works cooperatively with other departments to share member service order information.

D. Assists with billing functions

1. Provides backup support for importing meter readings for billing and reviewing edits. Investigates variances and provides information to the metering/staking staff for review. Estimates readings when appropriate.
2. Provides back-up support for billing processing. Verifies billing calculations and ensures that PCA, Credits, and rate tariffs are applied correctly.
3. Provides back-up support for generation of the statement file for the printer and email notifications to members.
4. Provides back-up support for penalty processing.

E. Collections

1. Member of collection team assigned to work with delinquent accounts, work with members on payment arrangements, and perform timely follow-up.
2. Follow Minnesota cold weather rule guidelines and utilize the billing system To document communications with members regarding collection matters.
3. Assist with E-Heat inquiries from local agencies.
4. Create disconnect orders and communicate pending disconnects to office services and operations staff.
5. Assist with reporting payments and sending files to collection agency.

F. Load Management

1. Process water heater transaction forms from member services.
2. Enter charges and add discount rates as applicable.
3. Prepare journal entries for efficiency rebates.

- G. Capital Credits and Unclaimed Property
 - 1. Assist with clerical functions related to capital credits.
 - 2. Assist with member questions.
 - 3. Assist with data entry related to unknown addresses and unclaimed property.
- H. Technology Support
 - 1. Assist with troubleshooting software and hardware issues and PC set-up.
 - 2. Assist with cyber security assessments and planning.
 - 3. Provide support for Cooperative projects and strategic initiatives
- I. Other Duties as assigned by CFO/Office Manager
- J. Comply with Cooperative's data security plan and safeguard personal information.

IV. **Relationship:**

A. Internal

- 1. CFO/Office Manager: To collaborate with on accounting, customer billing, customer inquiries and customer service matters; to review and inform him/her of major problems or developments; to obtain information, guidance and necessary approvals; to review and inform him/her of any major problems or developments on the operations and working relationships between personnel and departments.

B. External

- 1. Members: To answer questions and counsel members regarding collections, TV, billing, internet and assist in the maintenance of sound member relations.

C. Qualifications

- 1. Ability to meet and communicate effectively with members both orally and in written communications.
- 2. Prefer two-year technical or college graduate in business, accounting or information technology; two year's work experience will be considered in lieu of two-year college. Cooperative experience is a plus.
- 3. Competency with calculator and data entry required. Must be able to demonstrate proficiency with Windows and MS Office, principally Word and Excel.
- 4. Position demands applicant to be detail oriented and self-motivated.
- 5. Capability to work and communicate effectively with fellow employees.

PHYSICAL DEMANDS & ENVIRONMENTAL CONDITIONS

Job Title: Customer Service Representative	Department: Office Services
	Last Update: Oct 2019

Data collection method(s): Observation - Interview

Physical demands required to perform job duties	
Activity	Frequency – Examples
Standing	Occasionally stands
Walking	Occasionally walks within headquarters building to deliver/gather material
Sitting	Frequently sits to perform accounting functions, use calculator and computer
Lifting/Carrying	Occasionally lifts/carries materials weighing up to 20 lbs.
Twisting/Pushing/Pulling	Occasionally twists/pushes/pulls to file or retrieve material
Climbing/Balancing	Not applicable
Kneeling/Crawling	Not applicable
Talking	Frequently disseminates information/talks to customers
Hearing	Frequently receives work instructions and listens to customers and other FREA employees
Communication	Frequently communicates with FREA employees
Visual Ability	Frequently processes billing information and customer checks, uses calculator, and uses computer to retrieve and enter information
Bending	Occasionally bends to retrieve material/documents
Gripping/Grasping	Frequently grips/grasps mail to open and sort
Other Physical Demands	Not applicable

Environmental Conditions	
	Examples
Exposure to outdoor conditions: extreme cold/heat, precipitation	Not applicable
Low visibility	Not applicable
Extreme noise	Not applicable
Moving parts	Not applicable
Electric shock	Not applicable
High, exposed places	Not applicable
Radiant energy	Not applicable
Exposure to chemicals	Occasionally works with copier toner
Vehicular traffic	Occasionally picks up daily mail
LED screens	Heavy use of computer - 6-7 hours per day
Slippery conditions	Not applicable
Other environmental conditions	Not applicable
This analysis of the physical demands and environmental conditions accurately reflects the duties performed by incumbents in this position.	
Job Title: Customer Service Rep	Department: Office Services
Supervisor: Julie Resch	Incumbent: