



San Juan Water District  
9935 Auburn Folsom Road  
Granite Bay, California 95746  
(916) 791-0115  
www.sjwd.org

## Position Description Customer Service Technician I / II

**Status:** Non-Exempt, Non-Safety Sensitive  
**Supervisor:** Customer Service Manager  
**Revised:** November 19, 2025

### **Supervision Received and Exercised**

#### Customer Service Technician I:

Receives direct supervision from the Customer Service Manager and technical and functional guidance from Customer Service Technician II or III staff. This position does not exercise supervision over others.

#### Customer Service Technician II:

Receives general supervision from the Customer Service Manager and may provide guidance or training to Customer Service Technician I staff.

### **Primary Function**

#### Customer Service Technician I:

Provides customer service and support to the public; responds to inquiries and complaints; receives and processes payments and fees; assists with new connection and permit applications; and performs a variety of clerical and administrative tasks related to assigned responsibilities, under close supervision. This is the entry-level classification in the Customer Service Technician series and is distinguished by the performance of more routine duties requiring close instruction and guidance. Advancement to Technician II may occur after one or more years of experience, successful completion of job-related training, and demonstrated proficiency and competency in assigned responsibilities.

#### Customer Service Technician II:

Performs the full range of customer service duties including complex billing, account management, and reconciliation tasks; resolves escalated or sensitive customer inquiries; and may provide guidance to entry-level staff. This is the journey-level classification in the Customer Service Technician series and is distinguished from the entry-level Technician I by the performance of more complex and responsible duties requiring independent judgment and decision-making.

### **Essential Duties** - *Duties may include, but are not limited to, the following:*

#### Customer Service Technician I:

- Provide customer service in person, by phone, and electronically; respond to inquiries and complaints regarding utility services, rate structures, billing, payments, hydrant permits, and service orders.
- Receive, process, and document customer utility payments, fees, and reimbursements; process payments received by mail, phone, in person, and electronically.

- Reconcile and maintain cash drawer daily.
- Assist in resolving water-related service complaints.
- Maintain customer accounts by monitoring and ensuring the accuracy of account information.
- Provide estimates to title companies when properties are being sold.
- Prepare, track, and assign work orders related to leaks, service line breaks, water quality concerns, pressure issues, meter replacements, and time-and-material tracked services.
- Establish and maintain positive working relationships with co-workers, other District staff, and the public using principles of effective customer service.

Customer Service Technician II:

May perform all or some of the essential duties of the Customer Service Technician I plus the following:

- Notify customers regarding delinquent accounts, non-payments, and returned checks; apply late fees and penalties; follow up on payment arrangements.
- Research and investigate billing and payment inquiries; apply adjustments as appropriate.
- Prepare Will Serve letters, assign meters, and assist applicants with the application process.
- Attend and participate in meetings, seminars, and training as assigned.
- Process requests for service starts, changes, and cancellations.
- Assist with billing and collection processes.
- Establish new customer accounts.
- Perform related duties as assigned.

**Minimum Qualifications**

*Knowledge of:*

Customer Service Technician I:

- English usage, grammar, spelling, punctuation, and professional business writing.
- Modern office procedures, methods, and computer equipment, including Microsoft Office programs.
- Principles and practices of customer service.
- Methods and techniques of cash handling and reconciliation.
- Basic recordkeeping and filing methods.

Customer Service Technician II:

All the qualifications for the Customer Service Technician I plus:

- Advanced customer service principles, practices, and conflict resolution techniques.
- Modern office procedures, methods, and advanced functions of computer systems, including customer information systems (CIS), databases, and Microsoft Office programs.
- Methods and techniques of cash handling, account reconciliation, and auditing for accuracy.
- Billing and account management procedures, including adjustments, payment plans, and delinquency processes.
- Applicable laws, regulations, policies, and procedures related to customer accounts, billing, and collections.

*Ability to:*

Customer Service Technician I:

- Assist the public effectively by phone and in person.
- Learn District policies, procedures, and utility billing software.
- Perform basic mathematical calculations with speed and accuracy.

- Operate computers and standard office software.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

**Customer Service Technician II:**

All the abilities of the Customer Service Technician I position plus:

- Review, analyze, and reconcile complex documents, records, and transactions.
- Evaluate and recommend improvements to customer service processes and procedures.
- Interpret, apply, and clearly explain District policies, procedures, regulations, and applicable laws to the public.
- Resolve escalated or sensitive customer service issues with professionalism and diplomacy.
- Perform advanced billing, account management, cash handling, and reconciliation duties with a high degree of accuracy.
- Exercise initiative and independent decision-making within established policies and procedures.
- Prepare clear, accurate, and professional correspondence, reports, and documentation.

**Education and Experience:**

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:

**Customer Service Technician I:**

- **Required:**
  - High school diploma or equivalent
  - Possession of, or the ability to obtain and maintain, a California Driver's License with proof of a satisfactory driving record. Individuals who do not meet this requirement due to a physical disability will be considered on a case-by-case basis.
- **Desired:**
  - College level coursework in accounting, computer operations or customer service is desirable.

**Customer Service Technician II:**

- **Required:**
  - Two (2) semesters of college level coursework or two (2) years of experience related to business or accounting.
  - One to two (1-2) years of responsible experience equivalent to Customer Service Technician I.
- **Desired:**
  - Equivalent to an associate's degree from an accredited college or university with major course work in business or accounting.

**Physical Capabilities**

The physical demands described here 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 functions.

<i>Physical Requirements</i>	<i>Rarely (0-12%)</i>	<i>Occasionally (12-33%)</i>	<i>Frequently (34-66%)</i>	<i>Regularly (67-100%)</i>
Seeing				√
Hearing				√
Standing/Walking		√		
Climbing/Stooping/Kneeling		√		
Lifting/Pulling/Pushing		√		
Sitting				√
Approximate Maximum Weight to Lift	50 Pounds	20 Pounds		
Fingering/Grasping/Feeling				√
Describe Working Conditions	100 Percent Indoors; frequently sit at a desk for long periods of time; frequently twist to reach equipment and perform simple grasping and fine manipulation to write and use keyboard and other office equipment.			