



JOB TITLE:	CURRENT CLASSIFICATION/GRID	POSITION #
Customer Service Representative	Employee Grid Level 8	93

NOC CODE: 6551  
STANDARD HOURS: 35 per week (non-management)

JOB TITLE OF IMMEDIATE SUPERVISOR	SUPERVISOR'S CLASS/GRID	POSITION #
Corporate Controller	Management Grid Level 2	320

DIVISION	DEPARTMENT	LOCATION
Financial Services	Cash Control	Admin. Building

**PROGRAM FUNCTION:**

The Financial Services division is responsible for financial, assessment, procurement, asset management, and risk management/insurance functions and support for the organization.

The Cash Control department provides financial stewardship and management services for the County, including taxation, accounts receivable, utilities, accounts payable, cash receipting, payroll, customer services, general ledger reconciliations, and financial control.

**PURPOSE OF JOB:**

The Customer Service Representatives are one of the first contacts which the public will have contact with, via front counter reception and telephone. This position greets and directs customers, processes cash receipts, provides information on County services, working closely with the Financial Services department and all other departments.

The position also provides financial assistance to the Financial Services department through various financial and administrative duties. The Customer Service Representatives are continually cross training and sharing the duties assigned.

**Job Duties and Tasks:**

Every employee's participation in the County's health and safety management system is integral to our success. Together we have the responsibility to promote our health and safety program, follow safe work procedures and comply with Occupational Health and Safety legislation. To demonstrate that safety is our way of life we must all work to protect our own health and safety and the health and safety of those around us.

**Financial Support:**

- Entering financial data into computer system, including accounts payable and receivable invoices, journal entries, name/address changes, and land title changes into tax system;
- Verifying accuracy of data entry – checking batches and spreadsheets;
- Undertaking cash receipting and answering tax and account inquiries;
- Balancing and preparing bank deposits (daily or as required);
- Preparing and balancing cash receipt batches of electronic payments (PC and telephone banking);
- Inputting post-dated cheques into cash receipt system and importing daily;
- Administering, balancing and replenishing petty cash fund and general credit cards;
- Maintaining direct debit machine and liaising with service provider as required;
- Processing electronic tax certificates through the web page online services system;
- Processing accounts receivable batches for the online services system;
- Creating on-line access profiles for users to order tax certificates online;
- Pulling accounts payable invoices from the incoming mail and ensuring prompt distribution of same for approval and processing;
- Updating excel spreadsheets for larger County customers monthly statement processing;
- Preparing purchase orders for office and other supplies;
- Assisting visitors to the office relating to the purchase of County maps, merchandise and dog tags.

**Reception Support:**

- Greeting, screening and directing visitors to appropriate staff;
- Answering and directing all telephone calls and front counter inquiries to the appropriate departments;
- Establishing and maintaining positive relations with ratepayers and visitors to the office;
- Notifying/alerting appropriate staff of unusual, sensitive or emergency situations;
- Retrieving voice mail messages left after hours and forwarding to appropriate department;
- Opening, date-stamping and distributing incoming mail and faxes;
- Receiving and signing (goods received) for incoming courier packages;
- Processing out-going mail through the postage meter on a daily basis;
- Replenishing postage stamp supply.

**Financial Services Administrative Support:**

- Maintaining web site on behalf of the Financial Services department (uploading schedule of fees, budget summaries, financial statements, etc.);
- Coordinating County map updates, monitors inventory and re-ordering;
- Conducting Land Title and tax searches;
- Preparing correspondence and filing as required;
- Recording Record Financial Services department meeting minutes;
- Photocopying as required (budget packages, etc.);
- Creating and modifying electronic files for Accounting unit as required;
- Filing of all journal entries, cash deposit batches, bank reconciliations and other accounting records.

**Other duties assigned, including but not limited to:**

- Ordering office and furniture supplies, business cards and name plates for Financial Services;

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- Assisting with mailing list for County newsletters and other mail outs.

## **QUALIFICATIONS STATEMENT**

### **Education and Experience:**

- Post-secondary office administration diploma and experience working with office computers and business software; or an equivalent combination of education, training, and experience.

### **Knowledge, Skills and Abilities:**

- General office equipment, systems and procedures;
- Business English and grammar;
- Office Administration and systems, including Word and Excel
- Broad knowledge of County departments and programs
- Ability to operate computer, including MS Office software and proficient keyboarding skills;
- Ability to communicate tactfully, clearly, and effectively, and exercise mature judgment to deal effectively with customers, ratepayers and other County employees;
- Ability to prioritize own workload and set priorities;
- Ability to maintain a high degree of accuracy and consistency when performing duties;
- Ability to maintain confidentiality pursuant to FOIP and County policy;
- Ability to work as part of team, cross train and share workload with other Administrative-Customer Services Reps., and remain flexible within a changing work environment;
- Ability to establish and maintain working relationships with a variety of individuals or groups;
- Ability to address external deadlines and time pressures;
- High degree of discretion, sound judgment and professionalism;
- Good written, organizational and time management skills.
- Ability to obtain an acceptable criminal records clearance

### **Core Competencies:**

- Teamwork
- Customer Focus
- Interpersonal Skills
- Communication
- Confidentiality
- Record Keeping
- Trustworthy
- Transparent
- Respectful
- Collaborative

### **Training Matrix:**

- BUDDY
- FOIP General Awareness
- Electronic Records Training
- Customer Service
- Winter Driving Fundamentals/Defensive Driving
- MSI Prevention: Office Ergonomics
- Hazard ID, Assessment, and Control
- Workplace Violence Prevention

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- First Aid including AED (preferred)
- Fire Extinguisher (preferred)
- Anti-Racism Training
- Fit for Work Training

**Job Description Certification:**

I have read this job description:

\_\_\_\_\_  
Incumbent's Signature                      Name (print)                      Date

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This job description is an accurate statement of the position's assigned duties, responsibilities, and reporting relationships.

\_\_\_\_\_  
Supervisor's Signature                      Name (print)                      Date

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This Job Description is in the appropriate format and contains sufficient data for its evaluation in the County Job Evaluation Plan:

\_\_\_\_\_  
HR Manager's Signature                      Name (print)                      Date