

**CUSTOMER INFORMATION REPRESENTATIVE**

**Duties and Responsibilities**

This class of positions provides customer service utilizing computer databases and information technology to access information required for responses, overseeing customer service work and supervising Customer Information Representatives. Records, tracks, responds to, and resolves telephone, email and/or walk-in inquiries in an agency customer service center, agency help desk, or other agency customer service unit; provides information, records complaints and requests, and conducts research to resolve problems; forwards unresolved matters to appropriate staff and offices for further action. Enters customer information and inquiries into a computer tracking system. Performs related clerical administrative tasks and computer support work. There are three levels of responsibility in this class of positions. All personnel perform related work.

**Assignment Level I**

Under supervision, with some latitude for independent action, provides customer information and conducts research and clerical support duties. Performs tasks such as the following:

**Examples of Typical Tasks**

Answers telephone, mail, email and in-person inquiries and determines service required. Requests customer information needed to respond to inquiries. Records customer information, inquiry, and resolution in tracking system. Receives payments and fees, processes and generates payments and adjusts records accordingly. Refers complex requests for reply. Keeps customers apprised of status and progress on unresolved service requests. Aids less experienced Customer Information Representatives in mastering procedures and systems.

Answers routine, frequently asked and scripted questions, and provides information about services. May prepare written replies using forms and form letters. Updates inquiry tracking system to reflect actions taken, responses given and inquiries forwarded for further research and response.

Updates reference and source data and tables in agency Information Technology systems. Uses computer databases and information technology systems to research information needed to respond to and track the progress of responses to mail, electronic, telephone and in-person inquiries. Enters customer information into databases to update personal records and accounts.

**CUSTOMER INFORMATION REPRESENTATIVE** (continued)

**Assignment Level II**

Under general supervision with latitude for independent initiative and judgment, in addition to performing the duties of Customer Information Representative - Assignment Level I, responds to more complex and technical inquiries which have been forwarded; forwards very complex, technical and unusual issues to specialists for response. Coordinates responses to emergent problems; serves as group expert, advising and aiding less knowledgeable Customer Information Representatives. Prepares written responses, where appropriate.

**Examples of Typical Tasks**

Handles telephone, email, mail and walk-in inquiries referred by Customer Information Representatives - Assignment Level I.

Serves as group leader/expert. Trains, advises and aids staff in using information technology systems to obtain information to respond to issues, to maintain tracking system, and to recall information on the status of service requests.

Advises staff in proper telephone response techniques, walk-in protocols, how to obtain information to respond to inquiries and to identify issues that should be referred to supervisors or subject matter specialists.

Troubleshoots problem areas to recommend revised policies and procedures for customer service; may monitor calls to ensure quality of service and to determine information needed.

In the temporary absence of the supervisor, may perform the duties of that position.

**Assignment Level III**

Under general direction, with wide latitude for independent initiative and judgment, in addition to performing the duties of Assignment Level II, supervises assigned group(s) of Customer Information Representatives or monitors an entire tour using several computers and information technology systems. Works to resolve and respond to day-to-day operational issues and difficult and unique inquiries. Responsible for getting training for staff in specialty knowledge for customer service operation and for ensuring that Customer Information Representatives follow procedures, update databases and use information technology tools.

**CUSTOMER INFORMATION REPRESENTATIVE** (continued)

**Assignment Level III** (continued)

**Examples of Typical Tasks**

Supervises assigned groups of Customer Information Representatives; schedules work; evaluates performance of staff. May monitor calls handled by staff to assure quality of service, courtesy and accuracy of information provided.

Ensures that reference data and sources are updated and maintained. Recommends additional sources of information to improve service. Takes calls to sample issues and problems encountered by staff and recommends and implements new procedures.

Monitors issues arising during a tour and takes appropriate steps to respond to the issues. Prepares and/or reviews statistical reports analyzing the quantity, speed, level and quality of service provided.

**Qualification Requirements**

1. A baccalaureate degree from an accredited college or university; or
2. An associate degree or 60 college credits from an accredited college or university and one year of satisfactory, full-time experience responding to inquiries utilizing computers, databases and information technology systems for researching the answers to questions in a customer service, help desk or public information capacity; or
3. A four-year high school diploma or its educational equivalent and two years of satisfactory, full-time experience described in "2" above; or
4. A satisfactory combination of education and experience. Satisfactory, full-time experience working for a New York City government agency responding to inquiries utilizing computers, databases and information technology systems for researching the answers to questions in a customer service, help desk or public information capacity may be substituted on the basis of one year of NYC government work experience for two years of the experience described in "2" above. College credit may be substituted for the experience in a customer service, help desk or public information capacity on the basis of 60 semester credits for each year of the experience described in "2" above. However, all candidates must possess a four-year high school diploma or its educational equivalent.

**CUSTOMER INFORMATION REPRESENTATIVE** (continued)

**Qualification Requirements** (continued)

**Qualification Requirements for Assignment Level II**

To be eligible for assignment to Assignment Level II, candidates must have, in addition to meeting the above Qualification Requirements, one more year of the satisfactory full-time experience described in "2" above.

**Qualification Requirements for Assignment Level III**

To be eligible for assignment to Assignment Level III, candidates must have, in addition to meeting the Qualification Requirements for Assignment Level I, two more years of the satisfactory full-time experience described in "2" above.

**Direct Lines of Promotion**

**From:** None

**To:** To Be Determined