



Lead Customer Service Clerk

Class Code	FLSA Status	EEO Category	Represented Status	Salary Grade	Effective Date	Resolution #	Pages
658	Non-Exempt	6 – Admin Support	ATU	Clerical – 11A	Rev 6-25-03	NA	1 of 2

DEFINITION: Under general supervision, coordinates the daily operation of the District’s downtown Oakland ticket-sales office; supervises the scheduling and work activities of Customer Service Clerks; and ensures the proper handling of cash, credit card receipts, and fare instrument inventory.

REPORTS TO: The Customer Service Supervisor, Customer Services Manager, or designee.

ESSENTIAL FUNCTIONS:

- Records and reports daily ticket-office receipts; verifies and balances the cash drawers of all Customer Service (CS) Clerks, as well as checks, and credit card sales; and prepares daily bank deposits.
- Maintains an optimal inventory of fare media; distributes ticket stock to CS Clerks; verifies and balances previous day’s sales and replenishes stock; orders additional stock from Treasury as needed; and prepares the monthly Pass Sales report.
- Verifies and posts work on the Statement of Daily Receipts report, enters receipt information into the daily balance spreadsheets, and supplies all pertinent reports and information to the Treasury and Internal Audit department, as required.
- Schedules CS Clerks to maintain adequate coverage; records and tracks attendance, vacation days, and sick days; reports information weekly to the Payroll unit; and recommends overtime to the CS Supervisor when needed to cover absences.
- Applies District policies to advise all Ticket Office staff to maintain reliable, courteous, and timely customer service; refers to pertinent provisions of the Collective Bargaining Agreement, and provides information for disciplinary hearings, as needed.
- Investigates and resolves customer complaints, and refers escalated complaints to the CS Supervisor, as appropriate.
- Maintains contact with vendors regarding the delivery of District passes, tickets, and other fare media; schedules and confirms vendor deliveries; and fills purchase and phone orders.
- Prepares special requisitions and orders fare media from other transit agencies such as BART and San Francisco Muni; distributes fare media to the Ticket Offices; complies with all reporting requirements; and completes other associated administrative tasks.
- Monitors the daily activities of ID card processing; tallies card center totals; and provides monthly reports to the Customer Services Manager, and the Accessible Services department.
- Fills out Purchase Orders, and orders and distributes office supplies to the Ticket Offices, as needed.
- Performs the work of a CS Clerk, as needed.
- May perform periodic audits on the cash drawers of CS Clerks as directed by the CS Supervisor, reports results to the CS Supervisor, and applies District policies regarding cash handling.
- Performs related duties as required.



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MINIMUM QUALIFICATIONS:

Knowledge Of: Procedures and techniques for proper cash-handling; principles and practices of good customer service; basic arithmetic; and fundamental clerical and office procedures.

Ability To: Learn, interpret, and effectively enforce District business policies and procedures including those applicable to ticket and pass sales operations, as well as applicable provisions of the Collective Bargaining Agreement; effectively schedule, motivate, and train staff; communicate effectively in English both orally and in writing; perform arithmetical calculations; balance and reconcile discrepancies with cash-drawers and daily sales totals including cash, checks, credit-card receipts, and fare-media inventory; apply a customer service orientation to problem-solving situations; maintain composure when dealing with the public in stressful situations; effectively address and resolve complaints and other issues of concern to ticket office customers in a tactful and courteous manner; implement new procedures and systems that include new and/or updated computer hardware and software as they are adopted by the District, and train Customer Service Clerks in their application and proper use; and establish and maintain effective work relationships with other District staff, supervisors, and the general public using principles of good customer service.

Education: Equivalent to graduation from the 12th grade.

Experience: Three (3) years in customer service, and/or retail sales that included cashiering duties. Experience with transit related customer service and fare media sales are desirable. Bilingual or multilingual abilities are also desirable.

Special Requirements: May be required to demonstrate knowledge of commonly used spreadsheet programs at a basic level

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This Class Specification is intended to present a descriptive list of the range of essential functions performed by an incumbent in this class, but is **not** intended to reflect all duties performed within the job.

Revised
6-23-03

Date:

APPROVED BY RICK FERNANDEZ, GENERAL MANAGER