

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY  
THE HUMAN RESOURCES DIRECTOR**

The following actions are being posted in accordance with Civil Service Rule 109. In the absence of a protest addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

**Posting No:** 13  
**Fiscal Year:** 2019/2020  
**Posted Date:** 09/25/2019  
**Reposted Date:** N/A

**ESTABLISH THE FOLLOWING JOB SPECIFICATION(S):**  
*(Job specification(s) attached)*

Item #	Job Code	Title
1	1302	Customer Service Representative Trainee
2	1304	Customer Service Representative
3	1306	Customer Service Representative Supervisor

**Protests on an item should be addressed to the Human Resources Director** and can be submitted by mail to the City and County of San Francisco, Department of Human Resources, 1 South Van Ness Ave, 4th Floor, San Francisco, CA 94103 or by email to [DHR.ClassificationActionPostings@sfgov.org](mailto:DHR.ClassificationActionPostings@sfgov.org). All protests must be received in writing no later than close of business seven (7) calendar days from the posting date, and must include the posting and item number(s), the basis on which the protest is submitted and identify the affected parties.

Copies of this notice may be obtained from the Department of Human Resources or from the website at: <http://sfdhr.org/index.aspx?page=109>. Copies of Civil Service Rule 109 may be obtained from the Department of Human Resources, the office of the Civil Service Commission at 25 Van Ness Ave, Suite 720, San Francisco, CA 94102 or from the website at: [Rule 109 Position Classification and Related Rules | Civil Service Commission](#).

cc: All Employee Organizations  
All Departmental Personnel Officers  
DHR – Class and Comp Unit  
DHR – Client Services Unit  
DHR – Employee Relations Unit  
DHR – Recruitment and Assessment Unit  
DHR – Client Services Operations  
Micki Callahan, DHR  
Michael Brown, CSC  
Sandra Eng, CSC  
Christopher Colandene, SFERS  
Theresa Kao, Controller/ Budget Division  
E-File

**CITY AND COUNTY OF SAN FRANCISCO  
DEPARTMENT OF HUMAN RESOURCES**

**Title: Customer Service Representative Trainee  
Job Code: 1302**

**DEFINITION**

Under immediate supervision from a Customer Service Representative Supervisor, the Customer Service Representative Trainees are initially trained to, and as part of the training curriculum, receive and process queries from the general public requesting government services and information. Incumbents identify the type of service being requested by listening, asking relevant questions, evaluating information obtained and referring customers to appropriate and available City services. Incumbents work with increased independence as training progresses. Incumbents will be trained as primary customer service representatives on how to operate necessary customer management software or information systems that track service requests and response activities. Training will include: (a) customer service standards and procedures, (b) available City services, (c) use of telephone and computer terminal, and (d) procedures for effectively communicating and processing customer requests. Demonstrated competence and successful completion of the structured training program leads to the class of Customer Service Representative. Failure to achieve demonstrated competence or the inability to complete the training program results in loss of employment. Incumbents must demonstrate and communicate a knowledge and understanding of policies and procedures to customers; listen, speak, type at a computer terminal / kiosk, and interact with customers for prolonged periods of time; walk or stand for prolonged periods of time; utilize necessary computer database systems; operate mobile devices, computer, and computer programs, phones and queue management systems while assisting the public; and uphold confidentiality of information. The nature of the work may involve working during unpredictable periods of pressure and stress with high customer volumes. Customer Service Representative Trainees work a rotating shift that may include evenings, weekends and holidays. In the event of an emergency or natural disaster incumbents are required to report to work as usual and may be expected to work unusual shifts and hours.

**DISTINGUISHING FEATURES**

The Customer Service Representative Trainee class is the entry level class in the Customer Service Representative class series and incumbents in this class are provided on-the-job training and experience as customer service representatives under close supervision. This class is distinguished from the Customer Service Representative class by the latter's performance of customer service functions under general supervision, receiving only occasional instruction and assistance. Appointments in this class are exempt.

**SUPERVISION EXERCISED**

None

**EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.*

1. Actively and effectively participate in training to learn customer service standards and procedures, available City services, use of necessary computer systems, and procedures for effectively receiving, and processing customer service requests. Achieve competency in these duties by the end of the training period.

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**Title: Customer Service Representative Trainee  
Job Code: 1302**

2. Receive queries from the general public requesting City services or information.
3. Identify the type of service being requested by listening, asking relevant questions, evaluating information obtained and determine the type(s) of City services available to successfully handle the request.
4. Provide customer with the appropriate department's contact information, relevant tracking numbers, and provide appropriate transition to relevant departments and / or staff such as walking a customer physically to another location within the building.
5. Enter or look up customer information such as name, address, phone number, nature of request, status of city service, etc. into relevant applications/software systems.
6. Perform other job related duties as assigned.

**KNOWLEDGE, SKILLS, AND ABILITIES**

Knowledge of: effective customer service procedures and practices.

Ability or Skill to: deal courteously, effectively and tactfully with the general public and others; effectively work under pressure including calmly and effectively dealing with escalating or difficult situations; ask appropriate questions to identify complex requests for City services and information; learn about City services and how to select appropriate services to meet the specific needs of customers; identify queries which must be referred to trainer/supervisor; learn to operate phones and computers; listen, type, speak at the same time; stand, sit, or walk while providing in person customer service continuously for long periods of time; approach members of the public who appear to need assistance and ask questions to understand their needs; speak with a pleasant and clear voice; work harmoniously and cooperatively with departmental staff and customers from a variety of cultural and socioeconomic backgrounds; respect the right of privacy and maintain confidentiality of customers; and be attentive to and accurately record details of interactions and referrals.

**MINIMUM QUALIFICATIONS**

*These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.*

Education:

Experience:

Any combination equivalent to experience and training that would provide the required knowledge, skills and abilities would be qualifying. A typical way to obtain the knowledge, skills and abilities would be: Six (6) months (1040 hours) of verifiable full time customer service experience directly serving a diverse population to obtain information to determine and respond to customer needs.

License and Certification:

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DEPARTMENT OF HUMAN RESOURCES**

**Title: Customer Service Representative Trainee  
Job Code: 1302**

Substitution:

**SUPPLEMENTAL INFORMATION**

**PROMOTIVE LINES**

**ORIGINATION DATE:**

**AMENDED DATE:**

**REASON FOR AMENDMENT:** *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

**BUSINESS UNIT(S):** COMMN

**CITY AND COUNTY OF SAN FRANCISCO  
DEPARTMENT OF HUMAN RESOURCES**

**Title: Customer Service Representative  
Job Code: 1304**

**DEFINITION**

Under general supervision from a Customer Service Representative Supervisor, the Customer Service Representative receive and process queries from the general public requesting government services and information in a professional and courteous manner. Incumbents identify the type of service being requested by listening, asking relevant questions, evaluating information obtained and refer customers to appropriate and available City services. Incumbents must learn, maintain and communicate a knowledge and understanding of departmental policies and procedures to the customer on behalf of the City; listen and communicate with customers for extended periods of time; walk or stand for extended periods of time; utilize and operate computers, mobile devices, phones, queue management and other computer software while assisting the public; and uphold confidentiality of information. The nature of the work may involve working during unpredictable periods of pressure and stress with high customer volume. Customer Service Representatives work a rotating shift that may include evening, weekends and holidays. In the event of an emergency or natural disaster incumbents are required to report to work as usual and may be expected to work unusual shifts and hours.

**DISTINGUISHING FEATURES**

The Customer Service Representative class is the journey level class in the Customer Service Representative class series and incumbents in this class perform customer service functions under general supervision, receiving only occasional instruction and assistance. This class is distinguished from the Customer Service Representative Supervisor class by the latter's responsibility of supervising Customer Service Representatives and Customer Service Representative Trainees and investigating and resolving escalated or difficult customer service issues.

**SUPERVISION EXERCISED**

None

**EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.*

1. Receive queries from the general public requesting City services or information.
2. Identify the type of service is being requested by listening, asking relevant questions, evaluating information obtained and determine what type(s) of City services are available to successfully handle the request.
3. Provide customers with appropriate department's contact information, relevant tracking numbers, and provide appropriate transition to relevant departments and / or staff such as walking a customer physically to another location within the building.
4. Enter or look up customer information such as name, address, phone number, nature of request, status of city service, etc. into the relevant applications/software systems.
5. Assist in the training of Customer Service Agent Trainees on how to appropriately receive, assess and refer/route queries from the general public.

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**Title: Customer Service Representative  
Job Code: 1304**

6. Perform other job related duties as assigned.

**KNOWLEDGE, SKILLS, AND ABILITIES**

Knowledge of: telecommunication and computer systems, methods and techniques needed to operate equipment utilized by departments; and available City services and how to select appropriate services to meet the specific needs of customers.

Ability or Skill to: deal courteously, effectively and tactfully with the general public and others; effectively work under pressure including calmly and effectively dealing with escalating or difficult situations; ask appropriate questions to identify complex requests for City services and information; identify requests which must be referred to management; operate phones and computers; listen, type, speak at the same time; sit, stand or walk while providing in person customer service continuously for long periods of time; approach members of the public who appear to need assistance and ask questions to understand their needs; speak with a pleasant and clear voice; work harmoniously and cooperatively with departmental staff and customers from a variety of cultural and socioeconomic backgrounds; respect the right of privacy and maintain confidentiality of customers; and be attentive to, and accurately record details of interactions and referrals.

**MINIMUM QUALIFICATIONS**

*These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.*

Education:

Experience:

Any combination equivalent to experience and training that would provide the required knowledge, skills and abilities would be qualifying. A typical way to obtain the knowledge, skills and abilities would be: Successful completion of the 1302 Customer Service Representative Trainee program.

License and Certification:

Substitution:

**SUPPLEMENTAL INFORMATION**

**CITY AND COUNTY OF SAN FRANCISCO  
DEPARTMENT OF HUMAN RESOURCES**

**Title: Customer Service Representative  
Job Code: 1304**

**PROMOTIVE LINES**

**ORIGINATION DATE:**

**AMENDED DATE:**

**REASON FOR AMENDMENT:** *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

**BUSINESS UNIT(S):** COMMN

**CITY AND COUNTY OF SAN FRANCISCO  
DEPARTMENT OF HUMAN RESOURCES**

**Title: Customer Service Representative Supervisor  
Job Code: 1306**

**DEFINITION**

Under general supervision, a Customer Service Representative Supervisor is responsible for supervising the customer service operations and work of customer service staff engaged in receiving and processing queries from the general public requesting government services or information in a professional and courteous manner. Incumbents investigate and resolve escalated or difficult customer service issues from the general public. Incumbents participate in the recruitment hiring and training of Customer Service Representative staff, develop and evaluate their performance and take disciplinary action when appropriate. Incumbents must maintain a knowledge and understanding of policies and departmental procedures; operate a computer terminal / kiosk; maintain the confidentiality of information; utilize and operate computers, mobile devices, phones, queue management and other computer software while assisting the public; serve as the backup for customer service representative staff during high volume periods. Incumbents work a rotating shift that may include evenings, weekends and holidays. In the event of an emergency or natural disaster incumbents are required to report to work as usual and may be expected to work unusual shifts and hours.

**DISTINGUISHING FEATURES**

The Customer Service Representative Supervisor class is the first level supervisory class in the Customer Service Representative class series. This class is distinguished from the Customer Service Representative class by its focus on supervision and investigating and resolving escalated or difficult customer service interactions.

**SUPERVISION EXERCISED**

**EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

*According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.*

1. Plan, direct and coordinate the work of customer service representative staff engaged in receiving and processing queries from the general public for the purpose of obtaining City services or information.
2. Working with training staff to develop training, oversee the training of employees in the proper use of computer systems and equipment and the implementation of program policies and procedures.
3. Plan and schedule customer service representative staff work assignments; and oversee the maintenance of attendance records for employees on assigned shift.
4. Develop and evaluate the performance of and if necessary discipline customer service representative personnel.
5. Investigate and resolve escalated and difficult customer service issues from the general public; resolve related work and operational challenges.
6. Receive calls and queries from the general public requesting City services or information; identify the type of service being requested by listening, asking relevant questions,

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**Title: Customer Service Representative Supervisor  
Job Code: 1306**

evaluating information obtained and determine the type(s) of City services available to successfully handle the request; provide customers with the appropriate department's contact information, relevant transaction tracking numbers, and provide appropriate transition to relevant department and staff during high volume periods, which may include physically walking the customer to another location within the building.

7. Enter or look up customer information or status of a city service into the relevant applications/software systems.
8. Prepare written documentation such as memos, correspondence and reports.
9. Monitor the operation and maintenance of computer equipment.
10. Perform special projects as directed by management.
11. Recommend procedural and operational changes to superiors.
12. Call together interdepartmental meetings to facilitate the sharing of information across departments to ensure a more seamless customer experience.
13. Perform other job related duties as assigned.

**KNOWLEDGE, SKILLS, AND ABILITIES**

Knowledge of: provision of excellent customer service; telephone and computer systems; and methods and techniques needed to supervise customer service operations.

Ability or Skill to: direct, supervise, and evaluate the work of assigned personnel; investigate and resolve escalated and difficult customer service issues and requests for information or services from the general public; learn complicated departmental service processes for the public to be able to advise customers; deal courteously, effectively and tactfully with the general public and others while using relevant telecommunication and computer systems; effectively work under pressure including calmly and effectively resolving escalated or difficult situations; give instructions to Customer Service Representative staff about available City services and how to select appropriate services to meet the specific needs of customers; operate a computer terminal; listen, type, speak at the same time; ability to walk or stand for prolonged periods of time while providing in person customer service; speak with a pleasant and clear voice; work harmoniously and cooperatively with interdepartmental staff and customers from a variety of cultural and socioeconomic backgrounds; respect the right of privacy and maintain confidentiality of customers; and to be attentive to, and accurately record details of interactions and referrals; and prepare written documents in a clear, concise, accurate and understandable manner.

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DEPARTMENT OF HUMAN RESOURCES**

**Title: Customer Service Representative Supervisor  
Job Code: 1306**

**MINIMUM QUALIFICATIONS**

*These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.*

**Education:**

**Experience:**

Three (3) years (6240 hours) of verifiable full time customer service experience directly serving a diverse customer population to obtain detailed information to determine and respond to customer needs.

**License and Certification:**

**Substitution:**

**SUPPLEMENTAL INFORMATION**

**PROMOTIVE LINES**

**ORIGINATION DATE:**

**AMENDED DATE:**

**REASON FOR AMENDMENT:** *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

**BUSINESS UNIT(S):** COMMN