



Title: **Customer Service Representative/Customer Service Assistant Duties and Responsibilities**

Issued to: Customer Service Representative, Customer Service Assistant, Customer Service Supervisor, Universal Rail Supervisor

Approved by:


Chief Transit Officer

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INTRODUCTION

Customer Service Representatives (CSRs) and Customer Service Assistants (CSAs) provide the highest level of customer assistance to transit customers aboard CTA vehicles and in and around CTA transit facilities and must assist transportation personnel as required. CSRs and CSAs maintain rail stations to a consistent, professional and well-organized appearance to welcome customers into rail stations.

JOB KNOWLEDGE

CSRs and CSAs must maintain thorough knowledge of the following:

- Pertinent current bulletins, Executive Orders, standard operating procedures (SOPs) and techniques that apply to CSR/CSA duties and responsibilities.
- All material presented in the Authority's CSA and CSR training programs.
- The Authority's transit system, schedules, routes, transfer and connecting points and major points of interest in the Chicago metropolitan area.
- The fare structure, the operation and features of fare collection equipment, fare media and all rules and procedures governing fare collection.

DUTIES AND RESPONSIBILITIES

CSR and CSA duties and responsibilities include:

General

- Adhering to work schedules and accurately recording their time during their tour of duty.
- Complying with all current bulletins, Executive Orders and SOPs that apply to CSR/CSA duties and responsibilities.
- Understanding and following oral and written instructions.
- Accurately performing basic arithmetic operations.

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- Expressing themselves clearly, both verbally and in writing.
- Maintaining a neat and professional appearance, including the correct uniform, at all times while on duty.
- Wearing the CTA-issued safety vest and badges while on duty.
- Wearing prescription eyeglasses if so prescribed by the employee's eye care professional. Glasses must be clear only. Tinted glasses are not permitted. Contact lenses are prohibited.
- Maintaining current knowledge of rail car operation necessary to assist with making minor operational adjustments to trains and rail cars as required.
- Preparing and submitting all pertinent reports concisely, accurately and in a timely manner.
- Contacting Control Center Operations upon a personal relief.
- Notifying the Controller and the terminal's Clerk if comfort relief personnel fail to report for duty.
- Following rail system rules for personal breaks.

Starting and Completing Tours of Duty

- Touching their CTA employee ID to a Ventra Mobile Validator (MV) on a turnstile at their assigned station/area when starting and ending their tour of duty, and every hour on the hour during their tour of duty (+/- 10 minutes). If no working MVs are available, the CSR/CSA must telephone the Controller to report their 10-8 and 10-7. If no working phones are available, the CSR/CSA must notify the Controller via two-way radio.
- Properly completing and submitting various necessary reports, logs and forms before the end of their tour of duty.
- When working comfort relief jobs, touching their employee ID to the MV at the scheduled relief time at each assigned station upon arrival.
- Remaining at their assigned station until the scheduled end time of their tour of duty, regardless of when their relief arrives.
- Notifying the Controller if not relieved when scheduled and following Controller instructions.

Station Opening and Closing

- Opening and closing stations as determined by shift assigned, by Rail Service Bulletin or during emergencies.
- When closing stations,
 - Politely asking customers to leave the station and directing them to alternate service
 - Securing and locking all station doors and gates.
 - Calling the elevator car to the mezzanine and turning off the elevator.
 - Checking all station areas for customers and ensuring that all customers have left the property.

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- Notifying the Controller that the station has been secured and is free and clear of customers.
- When shift is ending,
 - Securing and locking the kiosk.
 - Leaving the station by an exit-only gate or station door and ensuring that the door is secure and locked.
- Notifying the Controller of any difficulties in securing the station.

Station Monitoring

CSRs and CSAs duties and responsibilities for station monitoring during their tour of duty include:

- Testing all turnstiles and high barrier gates with both their Ventra Customer Access Card and CTA employee ID card at shift start and hourly during the tour of duty.
 - Reporting any defects immediately via CTA Form 3028 *Rail Station Defect Log*.
 - Notifying the Controller immediately of any defects.
 - Noting defective turnstiles and gates on CTA Form 9821 *Daily Activity Report - Customer Service Representative/Customer Service Assistant (DAR CSR/CSA)*.
 - Keeping access gates locked unless assisting customers through them.
- Monitoring and coordinating station cleanliness, environmental conditions (such as snow, flooding, etc.), safety hazards, defective equipment and station repair needs in and around station facilities. Correcting these conditions or promptly notifying the Controller.
- Performing hourly platform and station inspections at their assigned station to check cleanliness, equipment functionality and customer safety, including when arriving at the station, after a rush period and before their tour of duty ends.
- Removing debris and trash using station supplies (gloves, brooms, dust pans, trash bags, etc.) during station inspections.
- Maintaining and keeping issued equipment and supplies secure.
- Ensuring the kiosk is adequately supplied with current editions of reports, forms, maps, brochures, schedules, service disruption sandwich boards, etc.
 - Disposing all outdated versions of these materials.
 - Notifying the courier and manager if supplies are needed.
- Displaying only Authority-approved materials in rail stations and rail station kiosks.
 - Checking that the permanent displays in the rail station such as system maps, route maps and timetables are current and readable. Reporting any wear or damage to the Controller.
 - Ensuring that the double panel stainless steel "Customer Alert" frames in the rail station contain only current, authorized postings (for example, Rider Alerts).

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- Verifying that the General Manager of the designated route has approved plans for any and all decorations **before** installation.

Note: Decorations cannot be installed on doors, windows, kiosk glass, turnstiles, vending machines, other Ventra equipment or anywhere else that would impede the safety or security of employees and customers or the station.

- Ensuring that displayed materials do not impede vision or negatively affect safety or security in any way.
- Performing daily inspections of station equipment and its proper operation, e.g., lights, elevators/escalators (as applicable), customer call buttons, station PA system, megaphone, flashlight, LED signs, ADA-related equipment, etc.

Note: Daily equipment inspections are performed by interacting with the equipment, e.g., lowering and raising overhead gates, turning the flashlight on and off again, etc.
- Documenting the findings of these inspections (and when corrective measures are taken) on CTA Form 3028 *Rail Station Defect Log* and in the Comments section of CTA Form 9821 *Daily Activity Report - Customer Service Representative/Customer Service Assistant (DAR CSR/CSA)*.
- Immediately reporting any missing items or defects to the Controller and management.
- If all station telephones are out of order, contacting the Controller using the portable radio on the appropriate route channel.
- Documenting station status, occurrences and inspections on CTA Form 9821 *Daily Activity Report - Customer Service Representative/Customer Service Assistant (DAR CSR/CSA)*.
- Reporting to the Controller when repairs are completed.
- Recognizing and reporting hazards, such as slip/trip hazards, lighting outages, sharp edges, fire hazards, etc.
 - Noting defects, unsafe conditions, work orders and repairs on CTA Form 3028 *Rail Station Defect Log*.
- Operating elevators hourly to ensure their proper functioning.
- Following current cold weather elevator cycling procedures.
- Calling the Elevator Status Line for updates at 15 minutes past the hour, every day, starting at 0615 through 2115 hours and completing the appropriate Elevator Status Form:
 - CTA Form 3200 - *Elevator Status Form (ESF) - Purple, Red, Blue & Pink Lines*
 - CTA Form 3201 - *Elevator Status Form (ESF) - Loop, Orange, Brown & Green Lines*
- Whenever two or more CSRs or CSAs are on duty and one is assigned to the turnstiles, the one assigned to the turnstiles must make station/platform observations, maintain station appearance and pick up debris.

Title: Customer Service Representative/Customer Service Assistant Duties and Responsibilities**Maintaining Kiosk Security**

- Keeping the kiosk neat and clean.
- Only using Authority-approved electrical appliances.
- Maintaining the security of the station kiosk and its contents and equipment.
 - Keeping the kiosk door/window closed and locked at all times.
 - Allowing access only to people who have proper authorization from the Controller and who are performing Authority business.
 - Adhering to kiosk occupancy rules.
- Keeping valuables in the kiosk out of sight and taking home all personal belongings at the end of their tour of duty. Securing valuables held in trust (such as lost and found items) or made up for the courier in the kiosk.
- Ensuring that all kiosk lights remain on during entire tour of duty.

Assisting Customers and Providing Customer Service

- **Providing helpful and friendly service to customers at all times.**
- Interacting with and effectively assisting customers in normal and emergency situations.
- Proactively interacting with and assisting customers on CTA vehicles and in and around CTA facilities in a **friendly, pleasant and congenial manner**.
- Initiating **courteous greetings** as customers enter and leave the station. (For example, "Thank you for riding the CTA," "How may I assist you?" and "Have a good day.")
- Assisting customers **from outside of the kiosk**.
- Maintaining position outside of the kiosk during rush periods (0600 through 0900 hours and 1500 through 1800 hours Monday through Friday), and at all times remaining alert, visible, customer-focused and available to assist customers.

Exception: Inclement Weather Exemption

During *peak* periods when the temperature stated on the Elevator Status Line is below 40° F (4° C), CSRs and CSAs may enter the kiosk to briefly warm up, *but only so long as:*

- There are no customers in the station area near the kiosk.
- No customers require assistance on the platform.
- ~~While in the kiosk, they remain alert, productive and prepared to assist future customers~~
- They exit the kiosk when any customer enters the area and they make themselves visible and available to assist the customer(s).
- They exit the kiosk after warming up. Even if there are no customers to assist, they must leave the kiosk and make station/platform observations, maintain station appearance and pick up debris.

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- Entering the kiosk only when Authority business dictates. Notifying the Controller whenever they are inside the kiosk more than momentarily.
- Using the kiosk or public phone for Authority business *only*, and *only as necessary*.
- During the bicycle exclusion hours (see SOP 8172 *Bicycles and Other Devices on the Rail System*), politely reminding customers with bicycles or other devices that bicycles, scooters and other devices are limited to buses during parts of the morning rush and evening rush.
- Providing service information to customers via the station PA system, megaphone, face-to-face interactions and sandwich boards.
 - Providing information on bus and rail schedules, fares, routes, transfer points, points of interest, facility and equipment accessibility, and any other information necessary to ease customer travel.
 - Issuing maps, schedules, brochures and other pertinent informational materials when requested or appropriate.
 - Informing customers of service disruptions **before** they pay and enter the station.
 - Informing customers of service delays and if requested, issuing CTA Form 3060 *Train Delay Notice*.
 - Informing customers of alternate routes during service delays in a timely, accurate and concise manner.
- When two or more CSRs or CSAs are on duty, they should work in different areas. For example, one must be positioned at the Ventra Vending Machines and another must be positioned at the turnstiles.

Customer Perception of CTA and CTA Employees

To project a customer-friendly image, CSRs and CSAs duties and responsibilities include:

- While on their shift, not eating, sleeping or engaging in conduct unrelated to their CTA duties.
- When in the kiosk, remaining alert, productive and prepared to assist customers.
- When customers enter the station, exiting the kiosk and making themselves visible and available to assist.
- When there are no customers to assist, making station/platform observations, maintaining station appearance and picking up and disposing of debris.

RESPONDING TO ASSISTANCE REQUESTS

- ~~Responding promptly to calls from customer call buttons.~~
- Providing assistance to customers with disabilities by:
 - Updating the elevator status board.
 - In a timely manner, asking "Do you need assistance here?" If yes, asking "Will you need assistance at your destination?"

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- Providing requested assistance that is safe and in accordance with CTA policy. For example:
 - Providing written or oral information, such as to explain fare collection equipment and facilitate fare purchases.
 - Deploying the gap filler and relocking it in its cabinet (see SOP 8154 *Use of the Gap Filler*).
 - Assisting with securement and release of mobility devices in rail cars.
 - Providing other assistance as specified in SOP 8181 *Assisting Seniors and Customers With Disabilities on the Rail System*.
- Ensuring posted customer information is current.
 - At the start of their tour of duty (or when instructed to do so), updating and maintaining the station transit information bulletin board and customer alert holders.
 - Posting customer alerts and removing them when they expire.
- Escorting customers between the paid area and the platform during evening and off peak periods if requested.
- Distributing Courtesy Cards following any incidents and collecting completed cards from witnesses.
- Providing their badge number verbally to any customer who requests it.

FARES

- Inspecting fare media and ID cards for validity and immediately reporting invalid material to appropriate personnel such as the Controller.
- Depositing monies found in the station onto the "Add Value" card according to current procedures. (See SOP 8242 *Ventra System: Currency Found at Rail Stations* for specifics.)
- **Customer Service Assistant only:** Contacting the Controller and following the Controller's instructions to refer customers to a Customer Service Representative for a refund when a customer experiences a failed fare transaction. Monitoring station turnstiles and Ventra Vending Machines (VVMs) for illegal activity.
- **Customer Service Representative only:** Issuing refunds to customers who experience failed fare transactions and monitoring station turnstiles and VVMs for illegal activity. (See SOP 8240 *Ventra Failed Fare Transactions: Rail* for specifics.)

Emergency Assistance

- Interacting with and effectively assisting emergency personnel (e.g., police and fire departments) when/if necessary.
- Contacting Control Center Operations in a timely manner to report all accidents, suspicious activity, disturbances, threats, fire, unusual occurrences or other emergencies and provides all pertinent information.

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- Providing assistance in the evacuation of persons from CTA facilities and/or vehicles as necessary. (See SOPs 7039 *Train Evacuation Procedures*, 7046 *Life Safety Evacuation of a Train*, 7047 *Non-Life Safety Evacuation of a Train* and 7048 *Rail Station Evacuation* for specific procedures.)
- As instructed by the Controller or other supervisory personnel, unlocking the megaphone case or flashlight lockbox and issuing and/or using the megaphone or flashlight.
- Securing and locking megaphones or flashlights in their cases or lockboxes after use.

SAFETY IS PART OF THE JOB

Follow all CTA established rules relating to safe operation, as well as those rules relating to use of tools, materials, equipment and personal safety in performance of these procedures.