Customer Account Representative III

DEFINITION
Under supervision from the Customer Service Supervisor, leads, trains, and assists Customer Service staff; tracks, reviews and refunds security deposits; researches, prepares and audits reports and analytical information; researches and settles more complex and difficult customer service problems; and performs related work as required.

DISTINGUISHING CHARACTERISTICS
Customer Account Representative III is the senior-level classification in the Customer Account Representative series. Under general supervision within a framework of established policies and procedures, incumbents regularly resolve more difficult and complex customer service problems requiring advanced knowledge of District policies and procedures relative to customer service; perform a variety of complex clerical and account maintenance duties; and lead, train and assist Customer Service staff in the performance of their duties. Assignments are given in general terms and are subject to review upon completion. There is significant latitude for independent judgment and action in well-defined areas of work.

This classification is distinguished from the journey-level Customer Account Representative II by regular performance of the most highly skilled duties related to customer service and account maintenance. This class is further distinguished from the Customer Service Supervisor which is a supervisory class responsible for the daily operation of a centralized customer services division.

TYPICAL DUTIES
TYPICAL EXAMPLES OF DUTIES MAY INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING:

- Functions as section lead assisting with staff training on various procedures and directing workflow; and serves as Customer Service Supervisor as needed.

- Interprets policies and procedures and exercises judgment to respond to the more complex and difficult customer inquiries and complaints pertinent to billing, fees, rate structures and District services; researches questions or problems and takes follow-up action as required.

- Researches accounts and prepares collections for field; activities include checking, sorting, scheduling and recording required actions.

- Logs and refunds monies, reviews accounts, applies payments and balances ledger for security deposits.

- Reviews customer account records for completeness and accuracy; maintains customer account files and related master meter records.

- Uses an on-line computer system to enter and research customer information; to prepare reports and analytical information; to create or update master customer account files and related meter records; and to create work orders for field personnel.
• Prepares correspondence and scheduled or special reports relative to customer service activities; provides backup and assistance to the Customer Service Supervisor on the preparation of special reports; and audits reports for management approval.

• Performs other related work as required.

REQUIREMENTS
Any combination of education and experience that would likely provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be the equivalent of:

Education and Experience:
High school diploma or its equivalent and five (5) years of office support work that involved the interpretation and explanation of policies and procedures to the public; or two (2) years as a Customer Account Representative II with the District. Experience or course work in financial or customer record keeping is desirable.

Knowledge, Skills and Abilities:
Knowledge of: practices and procedures related to accounting for receipts and the maintenance of customer accounts; basic business data processing principles as applied to customer account record keeping; commonly accepted practices and procedures for meeting and dealing with the public and solving customer complaints; standard office practices and procedures including record keeping principles and procedures; effective operation of a personal computer and other standard office equipment; proper written and spoken English, including spelling, punctuation and grammar; business letter writing and report preparation techniques; and basic business arithmetic.

Skill and Ability to: quickly learn and apply policies, rules, regulations and procedures to a variety of work-related situations; deal tactfully and effectively with customers, interpreting and explaining complex regulations and procedures, frequently in situations where relations may be strained; work independently and make sound judgments within procedural guidelines; provide lead direction and training on specific procedures to field and office customer account employees; oversee scheduling and follow-up on field collection activities; maintain attention to detail in a work environment of frequent interruptions; organize and prioritize work activities and meet established deadlines; analyze data, research information and resolve complex customer billing and service problems; balance cash receipts and maintain accurate financial records; make accurate arithmetic calculations; prepare clear and concise reports and correspondence; maintain complete and accurate records and files; effectively utilize an on-line computer system and other standard office equipment; type correspondence and forms with speed and accuracy; use spreadsheet and word processing software to generate reports and to maintain, track and compile data; establish and maintain effective working relationships with those contacted in the course of the work; and perform the essential functions of the job without causing harm to self or others.

Additional Requirements:
- Must possess a valid California driver’s license and have a satisfactory driving record.
**Working Conditions/Physical Requirements:**
The essential functions of this classification are performed in a controlled-temperature office in a dynamic environment requiring attention to detail while interacting with the public in person and on the phone and requires the ability to: sit for extended periods of time in front of a computer screen; intermittently twist to reach equipment or supplies surrounding desk; use finger dexterity and hand strength to perform simple grasping and fine manipulation; operate a computer and other office equipment on a daily basis; speak and hear in person and on the phone; see sufficiently to perform assignments; and frequently lift and/or carry items weighing up to 20 pounds and occasionally up to 55 pounds.

Revised: 07/12

Approved: [Signature]
Human Resources/Risk Manager