



Customer Account Representative III

DEFINITION

Under direction 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 advanced journey-level classification in the Customer Account Representative series. This classification is distinguished from the Customer Account Representative I and II by performing the most difficult and complex customer service problems requiring advanced knowledge of District policies and procedures relative to customer service. This class performs a variety of complex clerical and account maintenance duties and leads, trains, and assists 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; serves as Customer Service Supervisor as needed.
- Assists in planning goals, procedures, and work standards for the department.
- Assists the Customer Service Supervisor with daily operations of the department, including scheduling and overseeing customer service representatives.
- 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; research questions or problems and takes follow-up action as required.
- Research 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; makes security deposits.
- Reviews customer account records for completeness and accuracy; initiates contact with customers to discuss billing discrepancies; investigates, explains, or reconciles unusual usage, billing errors, or meter calibration problems; maintains customer account files and

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related master meter records.

- Uses an on-line computer system to enter and research customer information, prepare reports and analytical information, create or update master customer account files, and related meter records; creates 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; audits reports for management approval.
- Researches and collects requested data for Public Records Requests and yearly accounting audits.
- Oversees the ordering of office supplies and expenses.
- Audits customer accounts to determine eligibility for special rates based on financial need.
- Negotiates and arranges payment plans with delinquent customers.
- Exercises independent judgment to make necessary corrections on accounts and resolve problems that require detailed analysis, including handling escalations for the most challenging customer interactions.
- May act for the Customer Service Supervisor on an as needed basis.
- 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:

Possession of a high school diploma or its equivalent; and five (5) years of office support work which includes the interpretation and explanation of policies and procedures to the public; or two (2) years of full-time experience equivalent to that of a Customer Account Representative II within the District. Experience or coursework 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; proper written and spoken English, including spelling, punctuation, and grammar; business letter writing and report preparation techniques; and basic business arithmetic; modern office practices, methods, and computer equipment and applications related to the work, including word processing, database, and spreadsheet software.

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;

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work independently and make sound judgments within procedural guidelines; in a fast paced, high volume environment; 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; type correspondence and forms with speed and accuracy; use spreadsheet and word processing software to generate reports and to maintain, track and compile data; perform the essential functions of the job without causing harm to self or others; operate modern office equipment including computer equipment and specialized software applications programs; communicate clearly and concisely, both orally and in writing; establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

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: 03/2025

Approved: 
Human Resources/Risk Manager

