



## UNION JOB DESCRIPTION

**TITLE: Lead Customer Accounting Representative**

### DEFINITION:

Supervises Customer Accounting Representatives, Office Support Specialists, and Office Support Associate to ensure that customer billing any payment records are accurately and efficiently maintained and customers receive prompt and courteous responses. Assists and performs various departmental administrative functions in addition to acting as a District representative of the Finance Division.

### DISTINGUISHING CHARACTERISTICS:

This classification is a bid classification with the District selecting the successful candidate. Candidates must have progressed through all of the functional areas of the Customer Accounting Representative (CAR) classification.

### BASIC RESPONSIBILITIES:

1. Performs all functions of a Customer Accounting Representative.
2. Assists in assignment of work and scheduling of CARs and Office Support Specialists.
3. Provides assistance and guidance to CARs such as, but not limited to:
  - Difficult transactions and customer contacts
  - Extensive research
  - Preparation for hearings and court appearances
  - Monitors daily work for timely completion
4. Assists in the development, updating and evaluation of procedures as required.
5. Maintains CAR and OSS manuals.
6. Chairs or participates on various employee committees and/or projects.
7. Develops training materials, manuals, presentations and updates as necessary. Conducts training (individual and group) on assigned topics as approved by the Department Manager. Assists with training and instructor functions.
8. Performs limited management functions within a predefined scope as delegated by the Department Manager. Examples include such items as: granting of time off within predefined guidelines, allowing the working of overtime within predefined guidelines. If a decision needs to be made beyond the predefined guidelines, the Lead will go to the next level of management for final decision.
9. Assists in evaluating consumption, charges and duration of utility diversions. Calculates charges for billing diversions. Makes court appearances as a representative of the District to explain billing diversions when needed.
10. Supervises CARs, OSSs and OSAs, ensuring compliance with District standards, policies, and consistent application of departmental policies and procedures, Provides timely feedback on performance and work conduct. Keeps Department Manager informed of associated issues; elevates issues that may require disciplinary action to Department Manager.
11. Assists with assessment of assigned individuals and/or team by recommending developmental needs such as training (e.g., teambuilding, interpersonal communications, organizational/prioritizing, etc.). Evaluates performance of assigned employees/team and provides input to department manager as needed.

### OTHER RESPONSIBILITIES:

1. Performs associated duties as assigned.

### MINIMUM QUALIFICATIONS:

Knowledge of:

- Advanced customer relations techniques including dealing with difficult customers.
- Leadership techniques.
- Interpersonal techniques.
- Communication techniques, both verbal and written.
- Customer Accounting Representative skills and functions.
- District procedures, customer programs, policies and various District computer software and applications.
- Analytical and problem solving techniques.
- Math and accounting principles.
- District rate schedules and other fees.

Ability to:

- Effectively interact and communicate, both verbally and in writing, with all levels of the organization, outside agencies and public.
- Provide verbal and written instructions.
- Perform all functions of Customer Accounting Representative.
- Use computer and related software/systems for daily work.
- Use independent and discretionary judgment.
- Handle confidential material.
- Effectively manage and prioritize simultaneous assignments and tasks.
- Apply human relations skills in various customer situations.
- Effectively teach.
- Be flexible for reassignment to various Customer Accounting functions as required to meet departmental needs.

Education/Experience:

- High school graduate or equivalent.
- Three (3) years experience as a Customer Accounting Representative and have progressed through all of the functional areas of the classification.

License or Certification:

- Valid Washington State Driver License.
- Completion of all of the minimum requirements as outlined in the Customer Accounting Representative job descriptions.

### WORKING CONDITIONS:

- Work is performed in an office environment and may require travel to business meetings or training sessions at the District.
- Incumbents perform repetitive movements from use of a computer and mouse.
- Must be able to occasionally lift and carry archive boxes weighing up to 40 pounds.
- Occasional contact with the general public.