

## CUSTOMER ACCOUNT REPRESENTATIVE

### Position Summary

Outlined in this document is the position description for the Customer Account Representative and the various responsibilities performed in a service center. Requirements for each job include structured training and skill verification (refer to the training and skill verification sections in this manual for additional information). Job attributes and performance expectations are also defined.

As employees complete the structured training necessary, meet the requirements of the skill verification and progressive testing, they will be able to progress through their career field. The levels through which progress may be expected are as follows:

	LEVEL
Customer Account Representative	I
Customer Account Representative	II
Customer Account Representative	III
Sr. Customer Account Rep-Administrative	
Sr. Customer Account Rep-Control Center	

Advancement beyond the level of Customer Account Representative III will involve the Career Preference process, with consideration to seniority, qualifications and the needs of the service center.

As employees gain skills in the levels, progressive testing will be required to advance to the next level. The progressive testing will include hands-on, written or verbal testing and will be based on expectations outlined in the employees' current job level. (Example - to move from Level I to Level II, the employee would be tested for their knowledge of expectations in Level I).

The Trainee position (generally one year experience or the equivalent is required) is designed to determine the appropriate career path for the employee. The trainee position will give the employee the opportunity to experience the various career opportunities within a service center. It will also give the service center the opportunity to evaluate the Trainees' progression during their probationary period. The trainee position is described on the following page.

Movement from the Trainee position to a specific career will be through the Career Preference process.

## CUSTOMER ACCOUNT REPRESENTATIVE LEVEL I, II, III

Handles inquires, requests, complaints and payments of customers in person or on the telephone and through mail. Typing, recording and filing will be assigned as qualified. This job is comprised of three levels, with the employee progressing to the top of Customer Account Representative when qualified.

### Level I

Handles inquiries, requests, complaints and payments of customers calling in person or by telephone or by mail. Also performs duties such as typing and filing as assigned.

### Level II

Performs account maintenance tasks such as basic bill adjustments, meter order completion, final bill processing, charging off uncollectible customer accounts. Also process customer accounts for collection activities, scanning collection notices and preparing PUCO mandated collection reports. Issues checks to customers for final bill credits.

### Level III

Performs advanced bill adjustments such as manually billing customer accounts, bill audit and maintenance of special ledger accounts. Also able to perform unit work requiring advanced billing skills.

### General Comments

Must meet the company's general qualifications.

Job knowledge and competence will be demonstrated on a periodic basis by successful completion of job related skills verification.

Will participate in training as required. Work assignments will be based on training that has been received.

Will adhere to company and departmental policies, standards and established procedures.

This job description attempts to give examples of the tasks associated with the job; however, the listings are not all inclusive.

Safety is the responsibility of every employee at DP&L. All safety procedures or policies outlined in job procedures, safety reference guide, training classes and agency requirements (OSHA, etc.) are expected to be followed.



## CUSTOMER ACCOUNT REPRESENTATIVE LEVEL I, II, III

### Qualifications

#### Entry Level

Must possess a high school diploma or the equivalent, a valid driver's license and must have basic math and typing skills.

#### Fully Qualified

Must have a minimum of 4 years experience as a Customer Account Representative or the equivalent and demonstrate the ability to perform all tasks of the job. Must have successfully completed the Company's Customer Account Representative training program or the equivalent and pass all job related skills verification.

A minimum time at each level is:

Level I	- 1 year
Level II	- 1 year
Level III	- 2 years

### Job Attributes

Work requires a high level of accuracy. Limited amount of manual or physical skills or exertion required.

The job tasks include a moderate/high level of complexity such as analyzing customer accounts.

Awareness of potential hazardous conditions when originating service orders during customer interactions is critical. A normal office environment exists.

Regular tasks include the handling of substantial customer payments. Care when using Company equipment.

Confidentiality of customer account information is of extreme importance.

High level of contact with customers, and regular contact with other departments.

Work performed with occasional supervision. Assists lesser skilled employees as required.

CUSTOMER ACCOUNT REPRESENTATIVE LEVEL I, II, III

Performance Expectations Upon Completion of Training and On The Job Experience

Level I

Operate equipment required to complete various summaries, requisitions, forms, reports, lists, cards, etc., as required from time to time in connection with the work in the office.

Maintain and transcribe various data to permanent office records.

Receiving customer payments, issuing receipts, recording same, balancing and being responsible for funds, advanced or received, preparing daily bank deposits and authorizing routine credit.

Issuing duplicate bills.

Process collection agents' reports.

Prepare the daily cash report.

Process applications for service and requests for reconnects, disconnects, transfers of service, new meter installations and requests for meters to be set and/or removed. Responsible to process requests for credit information.

Enter basic meter readings to customer accounts.

Make payment arrangements on customer accounts.

Receive all types of service calls and gather adequate information and promptly initiate the appropriate order.

Has a working knowledge of national, local and Company codes and standards and other pertinent regulatory requirements as they relate to the Customer Account Representative responsibilities.

Perform other similar or less skilled work.

Reference: Verifiable Skills  
Structured Training



## CUSTOMER ACCOUNT REPRESENTATIVE LEVEL I, II, III

### Performance Expectations Upon Completion of Training and On The Job Experience

#### Level II

Basic account adjustment such as rate and revenue adjustments, enter meter readings, cancel/rebilling customer accounts, name/address changes, budget billing adjustments and other account adjustments such as guarantor and automatic transfer information.

Entering information provided by field personnel related to completion of service/meter orders.

Review final accounts to determine if customer has active service, transfer the final bill balance to the active service or mail the final bills.

Understanding of the guarantor requirements such as qualifications and procedures for guaranteeing customer account.

Charge off uncollectible accounts monthly. Weekly notify the appropriate collection agencies of uncollectible accounts charge off and payments made.

Daily printing and distributing RMS reports.

Respond to inquiries from customers' correspondence. Responses may be via correspondence or verbally to the customer.

Print first call notices for delivery. On the second call date, scan/review the first call notices to determine appropriate collection action.

Issue checks relative to customer accounts.

Has a working knowledge of national, local, and company standards and codes and other pertinent regulatory requirements as they relate to the Customer Account Representative responsibilities.

Perform other similar or less skilled work.

Reference: Verifiable Skills  
Structured Training

CUSTOMER ACCOUNT REPRESENTATIVE LEVEL I, II, III

Performance Expectations Upon Completion of Training and On The Job Experience

Level III

Knowledge of advanced bill adjustment practices such as manually billing customer accounts.

Daily processing of customer account bill audit.

File maintenance of special ledger accounts.

Completion of unit work such as advanced order completion, calculating billing problems created by dead meters.

Interaction with the more difficult or sensitive customer contacts.

Has a working knowledge of national, local and Company codes and standards and other pertinent regulatory requirements as they relate to the Customer Account Representative responsibilities.

Perform other similar or less skilled work.

Reference: Verifiable Skills  
Structured Training