



Application Processing

Job Family: Application Processing Department: Cross-functional Function: Customer Care Reports to (Job Title): Supervisor/Manager	Effective Date of Job Profile: Last Updated: April 2011
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Job Family Summary	Process energy efficiency program application from application receipt through application process completion.(either in the form of a payment, confirmation of reservation, rate change or rejection). File and store the physical application files.		
Major Responsibilities	Major responsibilities may include all or some of the responsibilities below <ul style="list-style-type: none"> • Open and sort mail, prepare physical files for applications and documents • Process applications according to current policies and procedures (verify completeness of application, verify customer eligibility, verify product eligibility; enter data in appropriate system(s). • Perform quality assurance reviews on applications • Batch and upload applications for payment • Answer customer inquiries related to applications • Update and maintain daily logs for productivity and quality assurance metrics • Research customer accounts and application issues • Prepare physical files for short-term and/or long-term storage • Practice and comply with PG&E safety, ethics and conduct requirements • Share process improvement ideas with Lead and Supervisor 		
Job Title	Cust Care Application Processor, Associate	Cust Care Application Processor	Cust Care Application Processor, Senior
Position Title	Application Processor, Associate	Application Processor	Application Processor, Senior
PGE Job Level	Associate – A&T	Intermediate - A&T	Senior
SAP Job Code	50419165	50419166	50419167
FLSA Status	Non-exempt	Non-exempt	Non-exempt
Job Responsibilities	<ul style="list-style-type: none"> • Meet or beat individual quantifiable productivity targets and error rates • Open and organize incoming mail & faxes daily • Download and print daily applications if applicable • Scan and validate applications • Enter routine data in spreadsheets or systems • Deliver mail to appropriate departments • Archive application folders • File application folders 	In addition to those for Associate, Career requires: <ul style="list-style-type: none"> • Enter moderately complex data in spreadsheets or systems • Verify that application meets customer and product eligibility requirements • Resolve routine application issues directly with customer by telephone or by composing correspondence • Recommend alternative program solutions to the customer if applicable • Update and maintain production logs • Participate in cross training 	In addition to those for Career, Senior requires: <ul style="list-style-type: none"> • Perform quality assurance reviews on applications • Resolve complex application issues directly with customer by telephone or by composing correspondence • Batch invoices and upload for payment • Review payment reports for any issues • Report any issues to Lead or Supervisor • Train others • Subject matter expert with CPUC handbooks, program policy and procedures • Communicate with system partners



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	<ul style="list-style-type: none"> Update and maintain production logs Complete other tasks and activities assigned 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Handle complex and escalated issues Develop new spreadsheets, reports and tracking tools Compile and manipulate data for reports Application tracking and metrics??
Supervisory Responsibility	None	None	May provide direction and coaching to other Application processors.
Education	<ul style="list-style-type: none"> High School graduate or Equivalent 	<ul style="list-style-type: none"> High School graduate or Equivalent 	<ul style="list-style-type: none"> High School graduate or Equivalent. College degree preferred
License/ Certification	None	None	None
Experience	<ul style="list-style-type: none"> Prefer 6-12 months general office experience 	<ul style="list-style-type: none"> Minimum of 1 year general office experience. 	<ul style="list-style-type: none"> Minimum of 2 years general office experience. Minimum of 1 year processing experience with demonstrated ability to meet/exceed individual targets
Knowledge, Skills, Abilities	<ul style="list-style-type: none"> Time management skills Organizational skills Filing skills Data entry skills Professional demeanor Ability to open and sort mail Ability to follow company policies and procedures with special emphasis on Safety, Conduct, Diversity and Inclusion Familiar with MS Word, Excel and Access 	<p>In addition to those for Associate, Career requires:</p> <ul style="list-style-type: none"> General Business understanding Customer service and communication skills Knowledge of various programs and program policies and procedures Ability to read and follow program policies and explain them to others 	<p>In addition to those for Career, Senior requires:</p> <ul style="list-style-type: none"> Proficiency in MS Word, Excel, Access and various energy program systems Ability to think independently and use independent judgment Ability to inspire others to work together as a team Ability to communicate effectively with internal and external customers and business partners. Expertise and advanced knowledge in processing policies, rules and practices. Ability to identify process improvements Ability to develop new spreadsheets, reports and tracking tools <ul style="list-style-type: none"> Advanced knowledge of various programs and rules
Working Conditions			
Supplemental Information			



Technical Competencies	Technical Competency Descriptions	Proficiency Level*		
		Associate	Career	Senior
Active Listening	Demonstrates skill in giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.	Novice	Proficient	Advanced
Oral Communication	Effectively expresses ideas and information through the spoken word using language that is appropriate to both the complexity of the topic and the knowledge and understanding of the audience.	Novice	Proficient	Advanced
Detail Orientation	Attention to detail and accuracy of documents.	Novice	Proficient	Advanced
Multi-Tasking	Quickly moves back and forth between two or more tasks, activities, or sources of information and remains focused.	Novice	Proficient	Advanced
Time Management	Prioritizes tasks with respect to importance and deadlines; adjusts priorities as situations change; utilizes sound methods to plan and track work and appointments; meets deadlines.	Novice	Proficient	Advanced
Adaptability (Open to Change)	Adjusts easily to changing business needs, conditions and work responsibilities; adapts approach, goals and methods to achieve successful solutions and results.	Novice	Proficient	Advanced

*Proficiency Levels

Novice: Demonstrates general understanding of knowledge, principles, and/or applications of the area; is able to complete routine assigned tasks with minimal guidance or supervision.

Proficient: Demonstrates solid understanding of knowledge, principles, and/or applications of the area; is able to complete moderately complex projects, with minimal guidance and supervision.

Advanced: Demonstrates advanced understanding of knowledge, principles, and/or applications of the area; is able to understand complex ideas and make recommendations in this area. May guide efforts of others on the team.

Master: Demonstrates mastery of knowledge, principles, and/or applications of the area; is able to lead and direct others in this area.