

# LISA A. WALKER

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## PROFILE OF QUALIFICATIONS

Ten years of experience working in an office environment for a regional electric utility company performing manual billing of services, time and materials which were not billed through automated or batch billing processes. Created and maintained working relationships with most functional areas in the company including Claims Specialists, Service Coordinators, Key Customer Managers, Service & Design Consultants, Outdoor Lighting Services, Job Processors, Line Crews, Dispatchers, General Foremen, Engineer's & Call Center Billing Representatives. Highly developed skills in:

Document Generation/Management	Organizing/Planning
Forecasting/Analysis/Estimating	Customer Service (Internal and External)
Inventory/Material Assessment	Research/Investigation
Sourcing/Requisitioning	Problem Solving/Conflict Resolution

Organized, quick learner, self-directed, and goal oriented. Acquired proficiency and expertise navigating and finding information in the various customized software packages used by the electric utility. Very experienced working with Microsoft Excel (details on page 2). Gained end-user experience using common business software packages including: MS Outlook, PeopleSoft, Realquest (Real Estate DB), MS SharePoint and MS Word. Familiar with tariffs and codes used by electric utilities and Sarbanes-Oxley compliance practices.

## JOB EXPERIENCE

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February 2001 to October 2011	Portland General Electric	Tualatin, OR
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### *Miscellaneous Billing Representative* (February 2001 through October 2011)

Worked with a team of five cohorts to resolve miscellaneous customer issues (which generally required complex research and analysis) escalated by Key Account Managers or Call Center Managers. This group was also responsible to generate accurate billing for New Construction, Recovery Claims, Area Lights, Street Lights and Unmetered Services in a timely manner. Billing for these items was accomplished by working system generated reports and performing various complex calculations using Excel spreadsheets. Once the billing calculations were made, the billable amounts were entered into CICS (prior to the customer's bill cycle close date) so the account would be charged accordingly.

Maintained and published the department procedure manual for Masterpiece and Area Light billing. Provided technical information about tariffs, policies and billing for Claims Specialists, Job Processors, Outdoor Lighting Specialists, Service Coordinators, Service & Design Consultants, Engineers, Key Customer Managers, Job Processors and Call Center Phone Representatives. Kept up-to-date with the new construction and material list, PGE pricing, billing policies and terms and conditions of service and other internal documents relevant to billing.

Learned and kept current with the various PGE IT systems: BOXI (Reporting System), Banner CIS, Document Management Services (Scanning & Document Storage Application), Field View (GIS), Masterpiece (Financial System), Outage Management System (Trouble Ticket System), Order Tracking and Fulfillment, Riskmaster (Liability Claim Tracking System), Street Light Inventory (PGE built DB), Street Light Maintenance, Transformer Information (DB), Transformer Management System and the Work Management System.

Represented the Miscellaneous Billing area in departmental meetings. Facilitated training in the Miscellaneous Billing area for job shadowing. Trained personnel in Masterpiece, Area Light, Street Light and Unmetered Service billing. Backed up Retail Billing in day to day billing. Acted as lead when lead was absent.

#### *Areas of achievement:*

- o Maintained and created spreadsheets to track training issues and procedures.
- o Worked in the Sarbanes-Oxley Audit to better improve the procedures and work flow, and fixed any gaps.
- o Processed the quarterly Sarbanes-Oxley Audit for Streetlights & Masterpiece to comply with the audit.
- o Worked on the Claims Business Process Management project to improve processes, role consolidation, and realize time and money savings.
- o Worked on the Address Finalist project (as a subject matter expert) to ensure CIS mailing and service addresses were accurate.

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- Worked on the Distribution Service Technology Business Case project (as a subject matter expert) to reduce the amount of systems that did not communicate to each other and roll them all into one incorporated system.
- Worked on the AMI (Automated Metering Infrastructure) on Cycle Billing Adjustment project (as a subject matter expert) to automate select adjustments in the CIS system.
- Worked on the Masterpiece Financial System Assessment project to evaluate if the current Masterpiece system was delivering the functionality required by the Miscellaneous Billing area.
- Worked on the Comcast/Portland General Electric audit to ensure PGE was correctly billing the unmetered power supply boxes used by Comcast utilities.
- Worked on the Masterpiece to PeopleSoft Conversion as a super user providing subject matter expert knowledge of our departments work and procedures. Performed user acceptance testing during the final QA phases of this project. Provided training to Miscellaneous Billing department after go-live.

## ***Claims Specialist*** (Cross Training - April 2006 through October 2006)

Researched Recovery Claims by reviewing paperwork from the field and/or talking to the appropriate departments/personnel to gather all the information. Performed field checks at damage sites to make sure everything has been repaired/replaced and to verify the party to be paid or billed. After reviewing sites in the field, decide whether or not more work needs to be completed or if the job is complete. If more work needs to be done, write up a new job. Review the appropriate systems, closing the correct jobs and complete appropriate tracking spreadsheets. Prepare the job for billing and review the invoice after it has been completed.

Research Liability Claims by reviewing the claim submitted by the customer, gather appropriate reports for the outage that caused the damage to customer equipment, talking to the appropriate departments/personnel to find all information. Then submit the data gathered to the Liability Claims department for them to determine it is a payable liability Claim.

### *Areas of achievement:*

- Learned the basics of the Claims Specialists job, programs and daily functions in just over a month.
- Flexible, adapt well to change and good team behavior.
- Back-fill as a Claims Specialists to cover vacations/illness when needed.

## **TECHNICAL EXPERIENCE**

- ◆ Maintained Pivot tables in Excel.
- ◆ Created and edited Macros in Excel.
- ◆ Used VLookups in Excel.
- ◆ Created and edited IF and IsError statements in Excel.
- ◆ Worked with Date functions and calculations in Excel.
- ◆ Used various formulas to perform monetary calculations in Excel.
- ◆ Applied cell protection and sheet protection to shared workbooks in Excel to ensure critical data and formulas were not accidentally altered by other users.
- ◆ Created charts in Excel.
- ◆ Completed Excel 2010/2007 (Levels 1 to 3) course with Kinetic Technology Solutions.
- ◆ Completed Outlook 2007 (Level 1) course with Kinetic Technology Solutions.

## **EDUCATION**

***High School Diploma – Tigard High School, Tigard Oregon*** (Graduated June 1995)

***Collage of Liberal Arts – Oregon State University, Corvallis Oregon*** (Fall 1995 – Fall 1998)

Worked towards a major in Sociology with a career goal of becoming a prison guard. Focused on sociology, psychology, philosophy, English and history courses. Also took courses in Computer Applications, Contemporary Math, Ethics and English Composition which would be more relevant to working in an office environment.