



## BILLING AND COLLECTIONS CLERK

### Job Description

#### OVERVIEW

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Liebert Cassidy Whitmore is a law firm that specializes in providing legal services and training to California public and non-profit organizations including local government, schools and colleges. More than just a law firm, we have been trusted advisors to these agencies for nearly 40 years.

The firm has a robust client training program that includes workshops, webinars, seminars and conferences as well as reference guides and libraries. The Billing and Collections Clerk bridges the Training and Accounting Departments and is responsible for: billing for all training products, collections of the same and reconciling accounts receivable. This person also reconciles our monthly credit card transactions and processes training contracts.

The Billing and Collections Clerk will be part of the Accounting Department and will work out of our Los Angeles office, reporting to the Accounting Manager.

The Billing and Collections Clerk must be able to handle the demands and pressures of a fast paced environment. It is expected that all tasks will be performed efficiently and accurately, with discretion, judgment, and a minimum of instruction and supervision. This position requires excellent organizational skills and attention to detail, along with the ability to multi-task and meet deadlines. The Billing and Collections Clerk must be a good listener and able to carry out specific instructions. The Billing and Collections Clerk must also be able to use a computer and perform basic office duties including faxing, scanning and photocopying. The duties of the File Clerk include, but are not limited to, those listed below.

#### PRIMARY RESPONSIBILITIES

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- Prepare, print and mail invoices to clients
- Ensure that special billing arrangements and discounts are applied to billings as required
- Issue client reminder statements periodically or whenever necessary
- Enter client payments into the accounts receivable system and verify that money received is applied to the correct invoices
- Keep accurate client records including payments, contact information, etc.
- Manage account balances to identify delinquent accounts, overpayments, short pays, etc.
- Discuss invoices and accounts with clients including complaints and contested billings
- Make phone calls to clients who are delinquent on their bills and arrange payment
- Prepare and process client agreements on an as needed basis
- Report on activity to upper management
- Prepare monthly and yearly reports of all billings

## SKILLS AND ABILITIES

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- Positive attitude (approachable, courteous, respectful) and professionalism under pressure
- Initiative and ability to work independently
- Organized with strong attention to detail
- Strong written and verbal communication skills
- Expert troubleshooting skills with ability to prioritize and resolve issues in a timely and thorough manner
- Ability to handle confidential information

## REQUIREMENTS

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- A High School Diploma is required
- 1-3 years of experience in billing, collections and/or accounts receivable is desired
- Proficient in Microsoft Office Suite (Word and Excel)



## ADA

Typical Essential Functions: The following essential functions are typical of functions which the individual occupying this position must perform unaided. A qualified person with a disability may request a modification or adjustment of the job or work environment (a reasonable accommodation), which the firm will attempt to provide, unless undue hardship would result.

1. Capacity to communicate and enunciate adequately, in person and via telephone, in a manner which can be understood by those with whom the coordinator is speaking.
2. Capability of dialing or otherwise using a telephone to place and receive phone calls.
3. Capability to pick up, leaf through, and read books, files and other materials.
4. Willingness and capacity to come and go from the workstation repeatedly throughout the day as is necessary to retrieve and shelve files, to make file folders and other labels, do copy work, send and receive faxes, and to perform other responsibilities.
5. Ability to access, input and retrieve information from a computer to produce typed copy, reasonably free of errors.
6. Willingness and capacity to travel to off-site locations.
7. Capability of moving containers weighing up to 50 pounds.
8. Capacity to reach forward to a high of 48 inches, to a low of 15 inches, to the side of 54 inches, and to the low side of 9 inches above the floor.
9. Willingness and capacity to sit or stand for prolonged periods throughout the work day.
10. Ability to load disks and to change settings on various equipment used in and around a law firm.
11. Ability to make/retrieve copies from various copy and fax machines.
12. Ability to work well with other staff members and attorneys in a demanding environment.

In addition to being able to perform the various functions, a Liebert Cassidy Whitmore employee will be required to have certain personal and professional attributes, so as to meet the skill, experience, education, physical, medical, safety, and other job related requirements established by the firm for this position.