#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Student Accounts Advisor

**Job Number:** SO-268 | VIP: 1302

**Band:** OPSEU- 6

**Department:** Financial Services

**Supervisor Title:** Manager, Student Accounts

**Last Reviewed:**  April 20, 2021

#### **Job Purpose:**

Under the direction of the Manager, Student Accounts, the Student Accounts Advisor (SAA) staff will provide efficient, accurate and timely front-line cashiering and customer service to students, visitors, and other campus partners. Provides up-to-date financial information and assistance with understanding accounts and university policies and processes. Meets with students to provide ongoing financial counselling as it relates to their financial health at the University, works with past due accounts and collection of outstanding debt.

#### Key Activities:

##### *Student Accounts – Frontline:*

##### Is the primary key customer service contact, projecting a positive, professional, and friendly image. Provides exemplary customer service coverage for demanding Control Desk setting.

##### Responds effectively and timely to all inquiries.

##### Performs cashiering functions; reconciling daily receipts, preparing bank deposits and processing electronic payments

##### Exercises expert judgement reviewing and assessing student account activity and makes necessary correction where appropriate.

##### Communicates a strong understanding of financial information and university policies and procedures. Responsible for emailing students about account and tax related messages.

##### Performs refunding functions (this includes data entry, running EFT payments and entering wire payment requests into 3 party software).

##### Audits weekly payment runs for students (this is part of cashiering function).

##### Issues income tax receipts and responds to related inquiries. Analyse student tax forms for inconsistencies and revise tax forms when necessary.

##### Process adjustments, charges, and credits to student accounts. (Includes fee waivers).

##### Supports back office by clearing outstanding deposits and resolving missing student payments.

##### Assists with the administration of the sponsorship process by saving and coding sponsor waivers.

##### *Student Accounts – Collections:*

##### Provides ongoing financial counselling to students as it relates to their financial health at the University. Identifies the most appropriate financial assistance available and works with other departments.

##### Continuous monitoring and communication to students and sponsoring agencies with past due accounts. Apply account restrictions and work to resolve outstanding accounts. Review, assess and approve various financial agreements to allow continued registration within a pre-determined limit.

##### Provide regular reporting and updates on past due account collections.

##### Investigate, analyze, calculate, adjust, and explain past due account activity.

##### Handles sensitive material with established policies and maintains confidential files. Coordinates financial appeal submissions, participates with committee decisions, and communicates final outcome.

##### Handles challenging situations involving individuals upset with University financial policies.

##### Provides monthly statements to all sponsored accounts and follows up on unpaid balances.

##### Customizes payments plans, weighing the risk to the University.

##### Identifies accounts for recovery through internal pre-collections process; sends statements, communication, final demand notices then forwards uncollected account to collection agency.

##### Monitors and responds to collection agency.

##### Receives, responds, and processes a variety of documents – bankruptcy, consumer proposals and credit counselling forms. Identifies accounts for write-off and possible settlement. Prepares documentation for litigation when necessary.

##### Processes agency payments to student accounts.

##### Reviews the agency’s or agencies performance.

***Student Accounts – General Office:***

1. Miscellaneous office duties (Updates address information from returned mail, filing, forms, and letters).
2. Identifies and recommends business process improvements and assists with implementation.
3. Creates and maintain user-friendly process documentation within Finance department.
4. Provides training and support to contract and student staff.
5. Other duties as assigned.

#### Education Required:

* Two-year College Diploma specializing in accounting.

#### Experience/Qualifications Required:

* Three years of progressive experience in an accounting environment is essential in ensuring that the work completed reflects proper accounting conventions and is auditable.
* One year experience in a service-oriented environment required and proven.
* Knowledge of accounts receivables and collection routines to secure payments.
* Experience in an electronic banking environment an asset.
* Ability to reconcile accounts.
* High degree of communication to effectively explain account statements and University policy with tact, diplomacy, and patience.
* The ability to relate effectively with students from varying social, academic, economic, and cultural backgrounds.
* Working knowledge of student taxation, preferred.
* Ability to diffuse emotionally explosive situations in a calm and professional manner.
* Demonstrated ability to work in a high volume, fast-paced, high stress environment.
* Demonstrated ability to work cooperatively with others.
* Ability and exercise judgment to handle sensitive data with complete confidentiality.
* Proficiency in computer applications including Word, Excel, and Access Database.

#### Supervision:

* No formal supervision of others is required.

**Job Evaluation Factors:**

Managers are requested to fill out the section below for job evaluation purposes.

**Communication:**

* Students—demonstrate a calm and patient approach when meeting with students who are experiencing difficulties paying their student fees. Communicate to provide timely account information and notification of past due fees
* Parents-responding to inquiries from parents regarding their son/daughter’s account situation while maintaining confidentiality and adherence to FIPPA and University access to information policies
* Collection agency-provide background information of debt and keep agency up to date on payments
* Trent International-to communicate student’s financial situation as TI cannot renew study permit until fees are resolved and student is registered
* Financial Aid Office-to communicate the need for OSAP funding and bursary referral
* Registrar’s Office-to communicate regarding transcripts, academic petition status, dispute with registration add and drop dates, release of degree,
* Academic Advisors- to communicate regarding financial appeals, academic petitions, reactivation and course add requests for students with past due fees.
* Graduate Studies-update Finance Officer on collections communications for graduate students

**Internal Contacts:**

* Students to provide information, direction, financial assistance, customer service
* Trent departments to verify OSAP standing, registration changes, departmental deposit information

**External Contacts:**

* Students/Parents – fees, tax information, outstanding account calculations
* Potential students – outlining fees and process
* Credit card provider transactions – resolving out-of –balance, returned payments
* Collection agencies – status of accounts and updates

**Motor/Sensory Skills:**

**Motor Skills:**

* Fine motor skills required for keyboarding and using an adding machine

**Sensory Skills:**

* Extensive use of computer; such as reading e-mail/Request Tracker messages
* Attention to detail
* Constantly changing screens to access data
* Ability to listen closely to understand issues and clarify meaning
* Assessing situations to determine emotional or physical state of customer
* Assessing situations to determine if customer is a security risk

**Effort:**

**Mental Effort:**

* Ability to multi-task, shift priorities with frequent interruptions
* Ability to reprioritize work based on new/unexpected issues that arise
* maintain composure with complaints and abuse from students and parents who dispute the fees owing to the university
* Resolve complex student issues (ie. Fees owing from prior year, OSAP restrictions, illness with student/family member, no consignor for student bank loan, desperation to complete studies, no money for books or living expenses
* Reading disturbing financial appeal submissions (i.e. assault, death, suicide)
* Maintain professional, listen and communicate effectively particularly in extremely difficult and contentious situations-Mentally demanding to listen to students who are desperate and have serious personal issues too

**Physical Effort:**

* Lifting and carrying bags of coin. Loading and unloading in and out of safe
* Sitting and keyboarding for extended periods of time

**Working Conditions:**

**Psychological Conditions:**

* Stress resulting from dealing with frustrated, angry, emotional and confrontational and verbally abusive parents and students
* Multiple competing demands
* Interruptions
* Exercise discretion, tact and empathy to students in crises or stressful situations
* Dealing with complaints and public criticism

**Physical Conditions:**

**Condition**

* Sitting and concentrating for long periods of time
* Constant phones ringing during peak times (tuition deposit, 1st instalment payment, 2nd instalment, tax time and summer fee payment)