**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Student Accounts Associate

**Job Number:** SO-006

**NOC:** 1431

**Band:** 5

**Department:** Financial Services

**Supervisor Title:** Manager, Accounting Operations

**Last Reviewed:** April 13, 2017

**Job Purpose**

Reporting to the Manager, Accounting Operations, the Student Accounts Associate will provide front-line customer service for the Student Accounts Office at Trent University; interacting with students, parents, staff, faculty and the general public. Provides up-to-date financial information to students and assists them with understanding the department’s policies and processes.

**Key Activities**

1. Acts as the Student Accounts primary key customer service contact, projecting a positive, professional and friendly image. Provides exemplary customer service coverage for demanding Control Desk setting.
2. Has a solid understanding of Trent’s billing system, and University services to respond effectively to all queries regarding student accounts. Answers all inquiries in a timely manner; in person, by phone or by email.
3. Performs cashiering functions; reconciling daily receipts and preparing bank deposits.
4. Analyze student accounts for billing inconsistencies and makes necessary corrections.
5. Performs refunding functions.
6. Process external scholarships to students accounts.
7. Issues income tax receipts and answers related inquiries. Analyze student tax forms for inconsistencies and revise tax forms when necessary.
8. Process adjustments to student accounts.
9. Assists with collections of undergrad student and staff accounts.
10. Updates student address information from returned mail.
11. Accounts payable data entry.
12. Departmental filing.
13. Others duties as assigned.

**Education Required**

Two year College Diploma specializing in accounting

**Experience Required**

1. Two years of office experience, plus at least one year of progressive experience in an

accounting/banking environment with electronic bank training

1. Ability to reconcile accounts
2. Excellent customer service skills
3. High degree of communication to effectively explain account statements and University policy with tact, diplomacy and patience
4. Demonstrated ability to work in a high volume, high stress environment
5. Demonstrated ability to work cooperatively with others
6. Ability to maintain professionalism under pressure while treating others with respect.

**Communication:**

**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
* Moneris – resolving out-of –balance, returned

**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
* Responding to complaints from public while maintaining composure and professionalism

**Physical Effort:**

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

**Working Conditions:**

**Psychological Conditions:**

**Condition ConditionDesc**

* Stress resulting from dealing with frustrated, angry, emotional and confrontation 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 ConditionDesc**

* 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)