**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Student Accounts Advisor

**Job Number:** SO-268

**NOC:** 1431

**Band:** 6

**Department:** Financial Services

**Supervisor Title:** Manager, Accounting Operations

**Effective Date:** June 18, 2015

**Job Purpose**

The purpose of the position is to provide advice and counselling to students in financial difficulty and to work collaboratively with students, parents and internal and external stakeholders to collect on outstanding student account fees. A key component to the position involves minimizing financial loss to the university and maximizing student retention when reviewing student requests for continuing registration. This position independently actions unpaid accounts to the collection agency. This role also coordinates the financial appeals, reviews submissions and makes award recommendations.

**Key Activities**

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| 1. Subject matter expert; providing advice and guidance to students who have past due fees and are experiencing financial difficulties. Meet with students to provide counselling on repayment options, alternative funding and financial assistance to resolve accounts. Conduct detailed assessment of individual student circumstances such as summer earnings, bank loans, OSAP entitlement, bursaries and scholarships when negotiating payment arrangements. Analyze and assess personal circumstances, financial situation and academic progression for students requesting to register with past due fees. Exercise judgement to balance financial loss to the university and student retention when authorizing continued course registration. Liaise and work collaboratively with Financial Aid, Trent International Program Office, Registrar’s Office, Housing Services and Academic Advisors to resolve outstanding accounts. This position frequently involves interacting with the parent(s) of students. | **25%** |
| 1. Coordinate financial appeal submissions from students who have withdrawn or dropped courses based on extenuating circumstances and/or medical reasons. Review past appeal submissions for consistency in decision making and exercise higher degree of analysis and judgement for appeals without precedent. Review and analyze all documentation and provide rationale when making award recommendations to management. Communicate appeal decisions to students within policy timelines. Responding to students who dispute financial appeal decisions requires a high level of communication skills to explain the financial appeal process and rationale for the decision. | **15%** |
| 1. Responsible for continuously monitoring outstanding student fees for the university. Demonstrate tact, sound judgement and diplomacy when communicating with students. Persuasion and negotiation skills are required to resolve outstanding accounts. Demonstrate flexibility and fairness as students generally have little or no income. Conduct analysis of past due reporting and implement restrictions for student access to grades, transcripts, course registration and release of degrees. Provide timely account statements and communications to students with past due fees. | **15%** |
| 1. Review student account transactions and conduct analysis for billing irregularities. Independently make decisions to reverse administrative fees and make adjustments to accounts where necessary. Conduct analysis of T2202A tuition tax credit and T4A for scholarships and bursaries to resolve discrepancies and make amendments to the tax forms when necessary. Make adjustments to accounts for returned cheques. (ie. NSF) | **10%** |
| 1. Develop collections strategies and independently decide on appropriate collection action for past due accounts. Assess student’s personal circumstances such as employment and income when reviewing and authorizing payment arrangements. Track payment arrangements to ensure compliance. Make decisions to outsource past due accounts to the collection agency. Work closely with agency to provide assistance and respond to inquiries. Ensure agency payments are received monthly. Verify accuracy of payment information on agency report and post student payments to accounts in a timely manner. Monitor and track success rate of collection agencies. | **5%** |
| 1. Assess individual circumstances when reviewing requests from students for emergency funding. Issue refund cheques to students on a case per case basis. Conduct weekly audit of refund cheques for the Student Accounts Office. Ensure there is appropriate back up documentation and verify student refund requests have been authorized by the Supervisor. Review refund cheque report for accuracy and authorize the issuance of cheques. | **5%** |
| 1. Acts as back-up to the front counter of the Student Accounts Office. Assist with phone and email inquiries as required during peak periods. Ensure that payments to accounts are processed accurately and timely. Balance cash receipts and session reports and ensure that deposits are sent timely to the bank. 2. Makes adjustments to student accounts from forms advice received from the Office of the Registrar for student add, drop and withdrawal. 3. Has a solid understanding of Trent’s billing system and University services to respond effectively to queries regarding student accounts. Answers inquiries in person, by telephone, voice mail and email. Employs a high level of communication skill to mastering escalated situations to resolve issues. 4. Updates student address information from returned mail. | **5%** |

**Analytical Reasoning**

* Analysis of individual student circumstances to resolve outstanding student fees. This includes using judgement when negotiating payment arrangements and requests from students for continuous course registration. Factors considered include student’s job situation and prospects, academic standing, time to completion of degree, payment history
* Analyze documentation for financial appeal submissions. This includes analysing documentation such as medical notes, obituaries, police reports, mental institution records.
* Analyze and interpret past due reporting. Requires reviewing a high volume of data to ensure accurate communications to students and timely collection efforts
* Provide detailed analysis of T2202A tax forms
* Analyze student accounts for billing errors
* Analyze success rates of collection agencies

**Decision Making**

* To independently make decisions to authorize course registration for students with past due fees. Independently may override financial restriction to allow student to register for courses
* To independently make decisions to authorize payment arrangements
* To independently restrict grades, registration, transcripts and degrees for students with past due fees
* To independently make decisions on accounts to send to collection agencies
* To independently make decisions to report students to the collections agency and credit bureau
* To independently make financial appeal recommendations
* To independently make decisions to reverse administrative fees (ie. Late payment charges).
* To make decisions to provide monetary assistance to students in dire financial need and in exceptional circumstances

**Impact**

* Direct impact to student retention rates when students have a financial restriction on the registration system (June 2013-560 students restricted from registering for Sept 2013)
* Impact for financial loss to the university (As of January 27/14-outstanding student fees for 2013AY total $7.7 million)
* Impact to the reputation of the university due to the nature of collection activity
* Impact to exacerbate student stress and anxiety over money matters
* Impact to international students if registration is restricted and study permit revoked
* Impact to OSAP students if communication regarding past due fees is not timely. OSAP funds may be deposited to the student’s bank account and spent before fee payment is remitted

**Education**

College Diploma (2 year) in Business, with course emphasis in Accounting.

**Experience Required**

1. Three years of experience in finance and collections.
2. Proficiency in computer applications including Word, Excel and Access Database.
3. In depth knowledge of Student Taxation referring to Eligible and non-Eligible exemptions.
4. The ability to relate effectively with students from varying social, academic, economic and cultural backgrounds.
5. Strong organizational, interpersonal, and communications (written and verbal) skills.
6. Ability to diffuse emotionally-explosive situations in a calm and professional manner.
7. Excellent time management skills, including organizing and prioritizing.
8. Able to work in a team environment.
9. Excellent attention to detail required.
10. Ability and exercise judgment to handle sensitive data with complete confidentiality.
11. Strong customer service focus.

**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
* Collection agency-provide background information of debt and keep agency up to date on payments
* TIP Office-to communicate student’s financial situation as TIP 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

**Effort**

* Effort to be 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
* Mentally demanding to 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 to buy books or live on
* Financial difficulties are a source of high stress and anxiety for students. Significant effort put forth to alleviate student concerns and offer options and solutions, particularly when meeting with students with mental health issues.
* Effort to maintain composure with complaints and abuse from students and parents who dispute the fees owing to the university
* Mentally demanding to read disturbing financial appeal submissions (i.e. assault, death, suicide)

**Working Conditions**

* Desperation by students who have no money
* Desperation to complete their studies
* Verbal abuse from students/parents who dispute account balance