#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Manager, Student Accounts

**Job Number:** X-182 | VIP: 1032

**Band:** EXEMPT-7

**NOC:** 0111

**Department:** Financial Services

**Supervisor Title:** AVP, Financial Services

**Last Reviewed:**  June 24, 2021

#### **Job Purpose:**

Responsible for the overall operations and service delivery within Student Accounts. Leads efficient and effective operations, providing high quality service to students and other stakeholders in order to contribute to increased student satisfaction and student success. Oversees and supports university billing of all tuition, ancillary and levy fees to all student accounts. Ensures timely and accurate invoicing, student tax form preparation, financial record maintenance, reporting, cash receipting and collection of all student fees.

#### Key Activities:

##### HR & Supervision

##### Responsible for managing daily operations within Student Accounts including full-time, contract and student positions. Oversees the daily activity of the team.

##### Determines and assigns workflow for staff and maintains positive office morale under stressful and heavy workload conditions.

##### Assigns special projects and assists in the timely completion of job activities.

##### Oversees training and scheduling of full-time, contract and student staff.

##### Ensures staff are aware and adhere to standards relating to service delivery and the legislative requirements of PIPEDA, FIPPA and Charter of Human Rights and all internal university policies.

##### Ensures all staff members are technically proficient in the effective use of existing and new systems.

##### Responsible for reviewing and revising job descriptions, interview questions, testing and hiring.

##### Provides regular coaching and feedback and conducts performance appraisals for staff.

##### Ensures service to students is prompt and courteous.

##### Provide direction and guidance in development and support of a top-level service team.

**Operations**

1. Ensures business functions are in place for efficient and streamlined operations.
2. Continually evaluates business processes to identify areas requiring improvement and implement process improvements as required.
3. Ensures all business processes are documented and periodically reviewed for accuracy to ensure consistency for processing and audit.
4. Ensures the integrity of information in the student systems and in other forms of record keeping to meet regulatory requirements.
5. Works closely with IT to continually evaluate systems and tools used by Student Accounts and implement solutions that improve efficiency and service.
6. Responsible for ensuring practices and operations contribute to the achievement of Financial Service goals.
7. Ensure service excellence and identify opportunities for new services.
8. Effectively communicate policies and procedures to students, staff and other departments.
9. Co-ordinates procedures and training needs for own and other departments.

**Financial**

1. Oversees and supports university billing of all tuition, ancillary and levy fees to all student accounts. Ensures billing is produced timely and accurately for each term.
2. Provide solutions to errors or identify corrective action required which may require extensive investigation and coordination with technical services and system (Colleague) support personnel and implement solution.
3. Oversees the sponsorship billing and Trent tuition waiver process to ensure timely billing to student and sponsored accounts.
4. Responsible for payment plans, electronic data transfers to and from 3rd parties.
5. Supports other operational areas with payment solutions. Acts as primary contact for credit card service provider and trouble-shoots between IT and service provider when system errors occur.
6. Oversees and supports the annual production and filing of student tax forms to the Canada Revenue Agency and re-filing all revised student tax forms, as required.
7. Recalculates tax forms as required and reconciles irregularities.
8. Collection of student social insurance numbers for annual tax processing and compliance with Canada Revenue Agency.
9. Supports the reconciliation and preparation of levy disbursements to over 50 different levy groups.
10. Supports and oversees reconciliation of student billing with accounts receivable sub-ledgers on a monthly and annual basis.
11. Manages finance charges and holds on accounts.
12. Works with Admissions and International and Off-Campus Housing to ensure accurate billing for international exchange students and scholars.
13. Ensures that daily receiving of all means of payment to the University are recorded promptly and daily receipts are balanced promptly and deposited into the bank account without delay. Investigates and resolves irregularities.
14. Assists with year-end audit and prepares bad debt analysis.

**Student Services**

1. Responds to inquiries or complaints from students, parents and staff from other departments. In particular, handles escalating concerns and complex queries.
2. Content provider for Student Accounts website and oversees regular updating of fees and important dates and deadlines.
3. Produces and co-ordinates out-going student communication, including messaging about fees, important dates, financial information and courtesy deadline reminders by means of mass email to all students.
4. Provides financial counseling for parents and students regarding payment options and payment plans with authority to negotiate special arrangements. When necessary, resolves problems and questions with students or parents regarding student finances. Contacts and initiates the settling of student account balances in escalated or special situations.
5. Communicates regularly with offices such as the Financial Aid Office, Registrar’s Office and Residence Life to make the Student Information System operations as seamless as possible for the students.
6. Approves all student account refunds.
7. Approves the processing of online credit card and international wire payment refunds.
8. Calculates and processes adjustments for billing irregularities, exceptions and withdrawn student’s accounts.
9. Reviews and approves financial appeals and confidential appeals that fall within Trent’s sexual violence policy.
10. Resolves contentious student issues for students placed with collection agencies when necessary.

**Other:**

1. Updates and maintains Student Information System. Work with Information Technology to build new modules and to fix or maintain current modules.
2. Works with International and Off-Campus Studies to ensure accurate charges/refunds for study abroad programs.
3. Updates the Academic calendar annually with financial due dates, processes and procedures for Student Accounts.
4. Manages special projects as assigned.
5. Plays a contributory role as part of the Management Team in Financial Services.

**Reporting:**

1. Continually monitors outstanding accounts receivable. Ensures that tuition fee T2202 and T4A tax forms are generated. Responsible to make all necessary corrections by re-filing with CRA.
2. File Stats Canada and MTCU Fee information and provide other reporting as requested

#### Education Required:

* Honours University Degree (4 years) required
* Advanced standing in a recognized Accounting Designation Program required

#### Experience/Qualifications Required:

1. Minimum of five years of related work experience in a post-secondary educational environment, including supervisory experience.
2. Demonstrated knowledge of university regulations, privacy rules as they apply to the public sector, policies and procedures.
3. Ability to deal with sensitive and/or highly charged individuals or situations.
4. Demonstrated ability to apply conflict management skills to reach resolutions on contentious situations and successful collection of overdue accounts.
5. Database management skills
6. Strong communication, problem solving, time management, project management and interpersonal skills with a focus on providing exceptional customer service in a team environment.
7. Working knowledge of functional aspects of student registration, billing and accounts receivable.
8. Innovative, creative and self-motivating to identify, collaborate and implement process/system improvements
9. Must be able to multi-task and work in a high paced, high volume work environment.

#### Supervision:

**Direct Responsibility for the Work of Others:**

* 2 Student Account Advisors
* Student Accounts Administrator
* Student Accounts Finance Associate
* Student staff
* Temporary staff as required

**Job Evaluation Factors:**

**Analytical Reasoning**

Well-developed analytical reasoning required to think through problems, assess options, and understand processes and communication results.

Ability to programme system-using complex rules to achieve the correct outcome for a diverse campus population.

Ability to apply appropriate principles (CRA tax rules, Ministry guidelines) and legislative requirements (FIPPA and Human Rights).

Comprehends all compliance for student tax form production and verifies the correctness for submission to CRA following current tax rules.

**Decision Making**

Make independent decisions that relate to:

* Use initiative in planning and developing best practices for building complex billing tables and interpreting and applying Canada Revenue Agency legislation for tax purposes.
* Approve accounts sent to collection agency , the agency’s style and method of collection to ensure their collection process meets the university’s expectation of customer service.
* Determine accounts selected for placement with the credit bureau and those that should be litigated.

**Impact**

Impact on the organization could be significant and long term. Errors that go undetected will affect revenue, can lead to damage to the university’s reputation, could result in inappropriate financial decisions and a loss of confidence with external clients such as the university auditors and financial lenders.

Student billings is responsible for the accurate calculation of all student billings; tuition fees represent nearly 60% of the University’s operating revenue and have a direct impact on students.

Sending a student account to collections or an incorrect list of students to collections can adversely affect the university’s reputation as public media can play a serious role in broadcasting this error.

**Communication**

Internal:

* Department heads
* Staff/faculty
* IT

External:

* Students/Parents/levy groups
* Government – CRA, Statistics Canada, MTCU, Ombudsman of Ontario,
* External auditors
* Banks, 3rd party payment providers
* Band sponsors, ‘other’ sponsors and educational authorities from other countries

**Motor/ Sensory Skills**

-Dexterity with using various programs and spreadsheets, editing data and manipulating large volumes of data while maintaining integrity of information

-Fine motor skills required for keyboarding with 100% accuracy

-Visually processing electronic information to identify incorrect or pertinent information and provide correct analysis

**Effort**

Mental:

* Work activities involve an almost continuous need for a high degree of concentration to focus simultaneously on several events or changing factors to work through system and accounting issues and problems to identify consequences, area affected and appropriate resolution while dealing with interruptions requiring immediate attention, including student billing design and testing impacting revenues and tax forms
* -Sustained focus to read material, reports and documentation to analyze problems and edit computer files and ensure billing accuracy
* Frequent exposure to mental pressure conditions and stress with deadlines that conflict or competing pressures, dealing with students and parents who are angry, demanding, uncooperative or emotionally disturbed, concern about staff and personal safety
* Ability to multi-task, shift priorities with frequent interruptions, reprioritize work based on new/unexpected issues that arise
* Ability to listening carefully to understand issues and clarify meaning to resolve problems,
* Visual attention to detail working with complex billing tables, updating fee information to website
* Negotiation with students not able to pay fees

Physical:

* Sitting for extended periods of time working on computer
* Lifting and carrying bags of coin. Loading and unloading and delivering to bank.

**Working Conditions**

Physical:

* Sitting and concentrating for long periods of time
* Constant phones ringing during peak

Psychological:

* Stress resulting from dealing with frustrated, angry, emotional and confrontational parents and students
* Multiple competing demands, conflicting priorities and deadlines
* Changing deadlines/time pressures
* Interruptions
* Exercising discretion, tact and empathy to students in crises or stressful situations
* Dealing with complaints and public criticism