#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Student Accounts Billing Coordinator

**Job Number:** A-487 | VIP: 1953

**Band:** OPSEU-8

**Department:** Financial Services

**Supervisor Title:** Student Accounts Administrator

**Last Reviewed:**  October 25, 2023

#### **Job Purpose:**

The Student Accounts Billing Coordinator assists the Student Accounts Administrator with updating, testing, and maintaining billing tables and the billing system. Assists with the preparation of student tax forms. Receives and reviews levy group’s financial statements and prepares levy installment payments. Provides general support to the student accounts team.

#### Key Activities:

##### Student Billings

* Compiles and collects approved departmental, institutional, and miscellaneous billing information.
* Collect, input, and verify the accuracy of data, test and evaluate fee logic and rules to ensure accuracy in test. Update student billing tables using Board-approved tuition fees and test in live to ensure integrity of data.
* Troubleshoots registration data and works with the Office of the Registrar to revise data for billing.
* Test billing tables in advance of student billings for each term and for the various categories of students. Identifies issues and works with Student Accounts Administrator to develop new rules where needed.
* Processes consolidated invoicing to each student account. This requires a high degree of accuracy.
* Processes billing adjustments, corrections, and exceptions to student accounts as identified and for late course additions. Communicates with student if late course billing increases or creates an outstanding balance on the student account.
* Assists with the collection of student’s SIN numbers in the preparation of student tax forms. Assists with the preparation and submission of T2202’s and T4A tax documents to the CRA.
* Assists Student Accounts Advisor with audit processes.

##### Student Group Levies

* Prepare payments to student groups based on student groups levy fees charged to and collected from students through student billings; this process is completed at least twice per year with interim levy payments during fall term and final levy payments in winter term.
* Collect annual financial statements and other required supporting documentation from student levy groups prior to release of final levy payments.
* Follow up on any outstanding documentation and concerns from student levy groups.
* Follow up on uncashed levy cheques and resolve with group.

##### System Administration

* Identifies system errors and resolves or works with Student Accounts Administrator to resolve or otherwise to escalate to IT.
* Develops queries and reports to support student accounts advisors.
* Responsible for daily system maintenance, including archiving records for optimal system usage and clearing system of past due balances and unallocated amounts to keep student self-service information accurate.
* Identifies and explores opportunities and insight on potential improvements and efficiencies for systems, and billing processes.

##### Student Accounts

* Responsible for accurate assessment and processing of monthly interest to students’ accounts.
* Monitors student accounts pre-collection payment plans. Forwards plans in default to collections.
* Responsible to generate and process monthly interest to accounts.
* Assists with general collection activity.
* Provides support to the student accounts team with year-end adjustments and correcting entries.
* Provides a high level of customer service and assists with staff training.
* Other duties as assigned.

#### Education Required:

* Honours Bachelor’s Degree (4 years) in E-Commerce, Business or Computer Science.

#### Experience/Qualifications Required:

* 3 years’ experience in an intermediate finance position, review, and large volume data manipulation experience.
* Demonstrated intermediate level proficiency in the use of MS Office (specifically Word, Excel, Access).
* Experience and proficiency with an automated student information system. Colleague experience is preferred.
* Strong communication, problem solving, time management and project management.
* Interpersonal skills with a focus on providing exceptional customer service in a team environment. Ideally, one year’s experience in a service-oriented environment.
* Accuracy and attention to detail.
* Working knowledge of functional aspects of student registration and billing, accounts receivable.
* Familiarity with privacy rules as they apply to the public sector, maintains confidentiality.
* Familiarity with University policy, procedures, and funding.
* Innovative, creative, and self-motivating to identify, collaborate and implement process/system improvements.
* Able to work and learn independently - self teach from manuals.
* Must be able to multi-task.

#### Supervision:

* No formal supervision of others is required.

**Job Evaluation Factors:**

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

##### Analytical Reasoning

*Has a solid understanding of university processes as it applies to student registration and billing. Demonstrates logical and critical thinking skills to think through problems, assess options, understand processes, and communicate results.*

*Requires the ability to program system using complex rules within system limitations to achieve the correct outcome for a diverse campus population.*

*Ability to apply appropriate principles (CRA tax rules, Ministry guidelines) to student billing and generation of student tax forms for correctness and compliance.*

##### Decision Making

*Use initiative in planning and executing billing to student accounts. Assists Student Accounts Administrator in analyzing whether existing process and rules will work to bill new programs with existing tables or new tables and rules are required.*

*Decisions regarding system maintenance could impact system users of the student self-service module and integrated payment system. Running the wrong utility will create additional transactions on the student account and cause additional questions from students and parents. The incorrectness of maintenance by selecting the wrong utility or the wrong sequence for correction will affect the accuracy of the student’s balance displayed for amount due and payment plans.*

##### Impact

*Errors in billing could be significant and if undetected, will affect revenue and could damage the university’s reputation. Inaccurate billing could lead to a loss of confidence with external clients.*

##### Responsibility for the Work of Others

*N/A*

##### Communication

##### *Internal departments staff/faculty*

##### *External students, parents and levy groups*

##### 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

*Physical:*

*Sustained concentration and focus to ensure the accuracy of the data for billing.*

*Sitting for long periods of time.*

*Psychological:*

*Ability to work with frequent interruptions.*

*Ability to prioritize work based on multiple competing demands.*

*Adhering to strict deadlines, timely completion of tasks within deadlines.*

*Ability to work in a high-volume and high-stress position.*

##### Working Conditions

*Responding to complaints.*

*Changing and conflicting priorities and deadlines.*

*Frequent interruptions.*