**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Student Accounts Assistant

**Job Number:** SO-416

**NOC:** 1431

**Band:** 05

**Department:** Financial Services

**Supervisor Title:** Manager, Accounting Operations

**Last Reviewed:** September 13, 2017

**Job Purpose**

The purpose of the position is to provide assistance and direction to students in financial difficulty and to work collaboratively with students, parents and internal and external stakeholders to collect on outstanding student account fees.

**Key Activities**

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| 1. Provides direction to students who have past due fees and are experiencing financial difficulties. Meets with students to provide repayment options, alternative funding and financial assistance to resolve accounts. Liaise and works collaboratively with Financial Aid, Trent International Program Office, Registrar’s Office, Housing Services and Academic Advisors to resolve outstanding accounts. Refers complex or difficult accounts to Student Accounts Advisor.
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| 1. Working with the Student Account Advisor or Manager, updates past due reporting and implements student restrictions. Assists with notification of past due accounts.
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| 1. Reviews student account transactions and conducts analysis for billing irregularities.
2. Conducts analysis of T2202A tuition tax credit and T4A for scholarships and bursaries to resolve discrepancies and make amendments to the tax forms when necessary.
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| 1. Works with collection agency to provide assistance and respond to inquiries. Verify accuracy of payment information on agency report and post student payments to accounts in a timely manner.
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| 1. Answers inquiries and responds to messages in the Student Accounts Advisor’s absence.
2. Acts as back-up to the front counter of the Student Accounts Office. Assists with phone, email and in-person 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.
3. Updates student address information from returned mail.
4. Prepares adhoc reports as requested by the Student Accounts Advisor or Manager.
5. Data entry of A/P vouchers and A/R refund requests.
6. Other duties as assigned.
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**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
* Provide detailed analysis of T2202A tax forms
* Analyze student accounts for billing errors

**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

**Impact**

* Impact to student retention rates when students have a financial restriction on the registration system
* 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**

Two years of post secondary education in Business

**Experience Required**

One year of experience in a Financial Services department at a College or University and a minimum of 4 months customer service and collection experience in a Student Accounts environment.

**Responsibility for the Work of Others**

* None

**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 reactivation and course add requests for students with past due fees.

**Motor/ Sensory Skills**

*Indicate the level of proficiency or precision in motor or sensory skills required by the job. Examples include but are not limited to: small/large movement to operate machinery; coordinated movement; equilibrium to maintain balance; dexterity to grasp, move, assemble objects or operate equipment; hearing, sight, touch, smell, taste. Provide a brief description of tasks performed that require motor/sensory skills.*

**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

**Job Description Approved by Human Resources** (as per Article 17.1):

Name (print):

Signature: Date:

**Signatures** - *indicating that the job description has been read and understood:*

**Incumbent**

Name (print):

Signature: Date:

**Immediate Supervisor:**

Name (print):

Signature: Date:

**Department Head/ Dean:**

Name (print):

Signature: Date: