#### Trent University LogoEXMEMPT JOB DESCRIPTION

**Job Title:** Assistant Director, Student Accounts

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

**Band:** EXEMPT-7

**Department:** Financial Services

**Supervisor Title:** Director, Client Relations (Finance)

**Last Reviewed:**  April 26, 2024

#### **Job Purpose:**

The Assistant Director, Student Accounts, is responsible for the comprehensive management of student accounts operations and service delivery. This role leads streamlined and productive operations, delivering exceptional customer service to students and other stakeholders, ultimately enhancing student satisfaction and success. The role is responsible for the oversight of activities related to the collection of all student tuition and ancillary fees, including handling complex complaints and de-escalating situations to provide timely and satisfactory resolution of student account issues.

The Assistant Director determines appropriate student payment plans and refunds, where appropriate, assesses student bad debts, and manages the collection agency relationship. The Assistant Director works collaboratively with other campus departments providing information and support to aid in establishing appropriate business processes and making decisions. This role ensures timely and accurate financial record maintenance, reporting, cash receipting and collection of all student fees and oversees and manages the student payments integrated e-commerce payment platform. The Assistant Director, Student Accounts is an integral member of the Financial Services Team.

#### Key Activities:

##### Student Services

* Handles escalated and complex inquiries and complaints, ensuring effective resolution while addressing specific challenges or intricacies involved.
* Determines appropriate content for the Student Accounts website and oversees consistent updating of fee information, payment options and collection processes as well as important dates and deadlines. Updates the University calendar annually.
* Develops a communication plan and oversees the delivery of out-going messaging to students.
* Provides financial counseling for students and parents, discussing payment options and plans with authority to negotiate special arrangements. Assesses settlement of student account balances in escalated or special situations through proactive contact.
* Develops productive, collaborative working relationships with other departments to make the student experience as seamless as possible to students.
* Approves all student account refunds and fee appeals. Adjudicates requests for exceptions to policy from financial appeals and processes appeals for those within the scope of Trent policies.
* Manages the relationship with the collection agency, including regular assessment of performance and leading the procurement process if a new agency is required.

##### Operations

* Ensures business functions are in place for efficient and streamlined operations that reflect student’s preferences and expectations balanced with policies, best practices, and strategic priorities. Ensures practices and operations align and contribute to the achievement of Financial Service goals.
* Identifies systemic issues and business processes for improvement and identifies opportunities for strategic change. Working closely with the Financial Systems Analyst, evaluates technological solutions and makes recommendations and implements process improvements.
* Identifies financial trends, political or legislative changes, and operational risks related to tuition payment and collection of fees while considering external influences that could affect the university’s financial stability.
* Ensures the integrity and accuracy of information in the student system and in other forms of record keeping formats to comply with regulatory requirements.
* Contributes to the departmental planning and strategic development of financial objectives.
* Demonstrates professional judgement in situations where clear direction is not available.

##### Financial

* Demonstrates a thorough understanding of the student account assessment infrastructure and ensures compliance with Ministry standards.
* Manages and troubleshoots the integrated e-commerce platform for student payments; processing debit/credit, ACH, and international payments. Supports the operations of the platform that processes approximately $65 million in annual transactions.
* Assists with audit and preparation of bad debt analysis for year-end. Provides research, analysis and reporting to senior management to support decision making for future student revenue.
* Oversees collection of current student fees, developing a proactive plan to recover monies owed. Oversees Trent’s collection services, providing direction on bankruptcies, consumer proposal, settlement offers and credit bureau reporting.
* Recommends appropriate level of deposits required for student fees based on analysis and sector research.
* Resolves complex business errors and operational system issues.

##### Supervision, Training and Mentoring

* Promotes exemplary customer service of the student accounts team, including monitoring performance metrics such as response times and time to resolution.
* Provides leadership and strategic direction to the student accounts team.
* Oversees workforce planning and ensures alignment with needs with priorities and monitors’ progress. Assigns special projects ensuring the timely completion of deliverables.
* Manages operations, allocating and organizing workflow to meet expectations required for smooth and efficient daily operations.
* Manages, supports, mentors, and coaches, providing regular feedback, guidance, and advice on escalated and challenging issues.
* Manages the staffing and performance of team members. Conducts annual performance appraisals.
* Promotes opportunities for training and professional development.
* Ensures adherence to standards relating to service delivery and the legislative requirements of PIPEDA, FIPPA and Charter of Human Rights and university policies.
* Ensures technical proficiency of staff in the effective use of student and payment systems.

##### Other

* Contributes subject-matter expertise to system upgrades and project teams as required. Manages special projects as required.
* Member of the management team contributing to the development and implementation of the strategic direction of the Finance team.

#### Education Required:

* Honour’s University Degree (4 year).
* CPA an asset.

#### Experience/Qualifications Required:

* Minimum of five (5) years’ related work experience in financial business operations, preferably in a post-secondary education setting.
* Minimum three (3) years’ supervisory and leadership management experience.
* Knowledge of accounts receivable, financial recording and reporting
* Ability to deal with sensitive and/or highly charged individuals or situations.
* Demonstrated knowledge of university policies, privacy, government legislation, and collective agreements.
* Demonstrated ability to apply conflict management skills to reach resolutions on contentious situations and successful collection of overdue accounts.
* Database management skills
* Excellent communication skills, problem solving, time management, project management and interpersonal skills with a focus on providing exceptional customer service in a team environment.
* Working knowledge of student registration, and billing to accounts.
* Innovative, creative, and self-motivating to identify, collaborate and implement process/system improvements.
* Ability to multi-task and work in a high paced, high volume work environment.

#### Supervision:

##### Direct Responsibility for the Work of Others

* SO-268 Student Account Advisors (3)

**Job Evaluation Factors:**

##### Analytical Reasoning

Work requires a high, well-developed level of analytical reasoning. Areas of responsibility are broad, complex, and multi-faceted. Judgment and critical thinking are required in interpreting and administering complex and highly developed reasoning skills to solve a broad range of diverse and complex problems/issues.

Requires a solid working knowledge of the University’s billing processes and legislation in order to provide appropriate rationale in response to student inquiries. Accurately assesses and de-escalates situations where students and/or parents, who are often in distress regarding their financial matters, have escalated concerns in order to provide a timely and satisfactory resolution.

##### Decision Making

Make independent decisions that relate to:

* Uses sound judgement when approving all student refunds and/or adjustments to the student accounts. The approach must be fair, justifiable and reasonable assessed on an individual student basis.
* Establishes the optimal collection strategy for achieving successful recovery of debt owed to the university. Ensures the agency’s style, and method of collection meets the university’s expectation of customer service. Identify the criteria for account placement with the credit bureau and those necessitating litigation. 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.

Sending accounts to collections can adversely affect the university’s reputation. The assessment of uncollectible accounts, refunds and/or adjustments to student accounts can reduce the University’s revenue and thereby impacts the University’s financial position.

The increase in students venting on social media platforms, complaints to the Ontario Ombudsman or MPP’s plays a serious role in broadcasting their dissatisfaction with the institution.

Inability to de-escalate and resolve situations with student accounts can have a negative impact on the University’s reputation.

##### Responsibility for the Work of Others

Direct Responsibility for the Work of Others:

* SO-268 Student Account Advisors (3)

##### 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

##### 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.
* Active hearing and listening when speaking with students.

##### Effort

Mental:

* Work activities involve an almost continuous need for a high degree of mental effort required Sustained concentration to deal with complex issues at the same time and solve complicated problems as they arise
* Multiple and competing deadlines and must establish priorities to ensure all tasks are completed
* Fast-paced, demanding and multi-layered
* 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 periods.

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.
* Increase in students in financial crisis.
* Increase in negotiating skills.
* complaints and public criticism on social media