

Job Description

Job Title:	Student Financial Services Associate
Department:	Finance
Reports To:	Manager, Student Financial Services
Jobs Reporting:	None
Salary Grade:	USG 6
Effective Date:	September 2018

Primary Purpose

The Student Financial Services Associate is accountable to the Manager, Student Financial Services for performing activities related to the assessment, payment and refunding of student tuition, housing revenue and related student fees in accordance with generally accepted accounting principles, established guidelines, university policies and procedures. The Student Financial Services team provides efficient, accurate and timely support to client groups.

Key Accountabilities

Process student financial transactions

- Exercise expert judgement in reviewing and assessing funding documents, student account activity and associated system information that impacts student financial information
- Correctly implement policies and procedures related to the assessment, payment and refunding of student fees
- Associates will be assigned primary responsibility for specialty areas (eg. administration of UHIP, student refunds, tuition benefit fee remission, collection of overdue student accounts, payment plans, issuing tax receipts), but will also be cross-trained in a variety of functional areas in addition to their area of specialization.
- Comply with and recommend improvements to business processes, forms and communications
- Identify transactions that require further investigation or complex situations where consultation with management may be necessary to ensure compliance with university policies and procedures and sound business practices

Provide advice, training and direction to students and campus partners

- Ensure that in-person, telephone and electronic student inquiries regarding tuition, other fee assessments and related matters are handled promptly, professionally and with courtesy
- Understand and communicate financial information and university policies and procedures
- Provide a positive impact on the student's experience at the university
- Provide student account expertise to The Centre staff, the wider campus community and external service providers (eg. Sun Life)

Other duties as assigned including, but not limited to

- Participate in system upgrade and other department projects as required
- Participate in compliance audits as required

Required Qualifications

Education

- University degree or equivalent education and/or experience
- Courses in accounting would be an asset

Experience

- Extensive experience in a professional customer service environment
- Experience interpreting, handling and communicating financial information
- Experience working in an administrative environment governed by policies and procedures
- Previous experience in an enterprise wide computerized accounting environment is an asset

Knowledge/Skills/Abilities

- Excellent interpersonal, communication (written and verbal) and customer service skills
- Demonstrated ability to prioritize and manage high-volume, time-sensitive assignments accurately and efficiently
- Keen attention to detail
- Aptitude for working with students
- Understanding of student financial aid is an asset

Nature and Scope

- **Contacts:** The Student Financial Services Associate must promote efficient and effective transaction processing practices and not yield to pressures. This position communicates internally with Finance team members as well as staff across the campus community. A strong working relationship must exist with staff in Registrar's, Student Awards and Financial Aid, Graduate Studies and Postdoctoral Affairs and Human Resources. The Student Financial Services Associate must have strong interpersonal skills and be able to effectively communicate financial information and procedures to students, both in writing and verbally. Externally, the Student Financial Services Associate may need to communicate with external service providers related to student health insurance.
- **Level of Responsibility:** The Student Financial Services Associate is responsible for processing transactions according to policy and procedure while meeting the service needs of the internal and external client groups and maintaining an appropriate level of confidentiality.
- **Decision-Making Authority:** The Student Financial Services Associate is expected to be self-directed in responding to client requests and must be able to work independently and prioritize their workload in order to meet deadlines. They must be able to identify when they need assistance and seek direction when required.
- **Physical and Sensory Demands:** Minimal physical demands typical of a position operating within a busy, fast-paced office environment. Keen attention to detail is required to ensure accurate results. The individual must be able to manage concurrent assignments. The individual must be able to multi-task and to deal gracefully with periodic interruptions.
- **Working Environment:** Minimal exposure to disagreeable working conditions typical of working in an office environment. There may be periods of irregular/high volumes e.g. during registration each academic term.