

Job Description

Job Title:	Student Financial Services Front Office Associate
Department:	Finance
Reports To:	Manager, Student Financial Services
Jobs Reporting:	None
Salary Grade:	USG 6
Effective Date:	November 2019

Primary Purpose

The Student Financial Services (SFS) staff provide efficient, accurate and timely support to students and other campus partners. The Student Financial Services Front Office 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 SFS Front Office Associate provides front-line direction to students and other visitors to the Finance office. The Associate also supports the Finance department with other assignments as required.

Key Accountabilities

Student financial services associate

Provide advice, training and direction to students and campus partners

- Responsible for front counter interactions with students, but will also be cross-trained in a variety of SFS functional areas in addition to this area of specialization.
- Ensure that student inquiries regarding tuition, other fee assessments and related matters are handled promptly, professionally and with courtesy
- Interact effectively and calmly with students in distress &/or with language barriers,
- 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

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
- 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
- Identify and recommend business process improvements, as appropriate
- Create and maintain user-friendly process documentation for this position and other Finance operations as assigned

Job Description



Finance office associate

- Facilitate the handling of urgent cheques, bank deposits, outgoing courier service, incoming mail and process credit card payments applying appropriate internal control procedures and confidentiality
- Assist with the publication of the University's audited financial statements, training materials and other documents
- Coordinate the maintenance and service of Finance department office equipment and physical space
- Responsible for the control, use and reconciliation of a purchasing card to maintain adequate inventory of supplies
- Coordinate the retention of the University's financial records in accordance with appropriate guidelines

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
- Support other SFS and Finance staff in business-critical responsibilities as required
- Other duties as required

**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, 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

- Exceptional verbal and written communication skills
- Demonstrated outstanding interpersonal skills; in particular, experience interacting effectively with clients under stress or with limited English language skills
- Keen attention to detail
- Demonstrated expertise and poise working in an environment with multiple competing demands
- Excellent time management strategies

Nature and Scope

- **Contacts:** The Student Financial Services Front Office Associate must have excellent interpersonal skills. This position communicates internally with Finance team members as well as staff across the campus community. The Associate must represent Finance in a positive and professional manner when welcoming internal and external visitors to the Finance office. The Student Financial Services Front Office Associate must promote efficient and effective transaction processing practices and not yield to pressures. 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 Front Office Associate must be able to effectively communicate financial information and procedures to students, both in writing and verbally. Externally, the Associate may need to communicate with external service providers.
- **Level of Responsibility:** The Student Financial Services Front Office Associate is responsible for processing transactions and providing information and direction consistent with 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 Front Office Associate must 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. As reception duties are required, the individual must be able to multi-task and be able to deal 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.