

Financial Assistant I - Student Accounts

Job Description

Position Information

Position Title	Financial Assistant I - Student Accounts
Position Number	ACCTSUPP02*6948
Department	Accounting
Reports to (Title)	Director of Student Accounts & Bursar

Seated Employee

Employee First Name

Employee Last Name

Job Summary

In three to five sentences, please briefly describe the job's primary purpose to the department.

Job Summary

The Financial Assistant I processes data entry and performs cashier functions for students and non-students. This position is responsible for processing and maintaining student forms and records. In addition, it serves as the primary receptionist and customer service representative for the Office of Student Accounts.

Position Summary Information

Select the level of education needed to successfully accomplish the essential duties of this job. High school diploma or general education degree (GED)

If a specific degree, certification, license, or registration is necessary, please list. n/a

Select the level of experience needed to successfully start the position and accomplish the essential duties of this job. One year or more

Preferred Qualifications

FLSA Category	Non-Exempt
Staff/Faculty	Staff
Employment Status	Part-Time
Employment Category	Regular
Essential Staff (emergency situations)?	No

On-Call?**Essential Responsibilities**

List the job's most important responsibilities. There are probably no more than six of these. Also indicate the approximate percent of time spent on each job function. (Note: Do not record how the job responsibilities are carried out.)

Essential Responsibility percentage of time needs to equal 100%

Responsibility**Processes and reconciles all data entry, cash receipts and reports**

- Enter and process tuition, advance deposit, scholarship, preschool and insurance payments.
- Process and reconcile all deposits from various campus departments.
- Support departments with billing for various services and fines.
- Prepare and deliver bank deposits.
- Manage reports for Pioneer Card transaction balancing.

Percentage Of Time

40

Responsibility

Process, manage and complete various office functions

- Process billing agreement forms, non-student statements, and report verifications.
- Maintain office inventory.
- Regularly review and update the Student Accounts Office Procedure Manual to ensure accuracy of all processes.
- Notify students and college offices of upcoming due-dates and deadlines.
- Collaborate with other departments by implementing registration holds, transcript holds, balancing scholarship payments, and assisting with federal employment and Work Study forms.

Percentage Of Time

35

Responsibility

Provide professional receptionist and Cashier services

- Monitor cashier email accounts, corresponding in a timely and factual manner.
- Respond to telephone inquiries, and assist students and parents with questions or concerns.
- Create and maintain individual student files.

Percentage Of Time

15

Responsibility

Assists the Bursar

- Assist the Bursar with any assignments or tasks including, but not limited to, collections, paid loan processing, student billing, and closing of graduate accounts.
- Maintain scholarship reports for 1098t process.

Percentage Of Time

10

General Responsibilities**General Responsibilities**

- (1) Maintain regular attendance in accordance with department policy.
- (2) Comply with all safety policies, practices and procedures. Report all unsafe activities to supervisor and/or Human Resources.
- (3) Understand and comply with the policies of the College Staff Handbook.
- (4) Demonstrate commitment to customer service. Establish effective relationships with internal and external customers and respond to their needs.
- (5) Perform duties as a team member in a manner supportive of department and College procedures, policies and goals.
- (6) Protect confidentiality of College information.

- (7) Provide leadership to others through example and sharing of knowledge/skill.
- (8) Communicate with others in a courteous and helpful manner.
- (9) May be asked to fill positions considered essential during weather emergencies or other events requiring special staffing.
- (10) Perform other duties as assigned.

Supervisory Responsibilities

Does this job have supervisory responsibilities?

No

If yes, then check all that are supervised by this position.

Supervise Student Staff

No

If you supervise student staff, enter approximately how many and the total hours? (e.g., 2 students/XX hours)

Supervise Non-Exempt Staff

No

If you supervise non-exempt staff please enter the number.

Supervise Exempt Staff

No

If you supervise exempt staff please enter the number.

Select the level of supervision that this position provides.

Supervision Received

Select the level of supervision that this position receives from their supervisor.

Direction: receive guidance with respect to general objectives; in the majority of tasks and projects assigned, determine methods, work sequence, scheduling, and how to achieve objectives of assignments; operate within specific policy guidelines.

Computer Operations

Please check one of the following

Proficient personal computer skills including electronic mail, record keeping, routine database activity, word processing, spreadsheet, graphics, etc.

Travel

Please check one of the following

No travel required.

Essential Function Analysis

Accurate identification of essential and marginal functions and the time required is important for making a variety of personnel decisions, including recruitment, hiring, performance evaluation, discipline, training and accommodation. The analysis explains the components of the job by identifying who, what, why, how much, and when.

Essential functions are those functions that individual must be able to perform either unaided or with the assistance of a reasonable accommodation. A job function may be considered essential if it meets one of the following criteria:

- the position exists for performance of the function;
- a limited number of employees can perform the function, and it, therefore cannot be reassigned;
- the function is specialized and requires certain expertise to perform it.

Many jobs will also have marginal functions. Marginal functions are those that may be performed by the position but are not tasks critical to job success, can be completed in a number of ways by a variety of people, and are not the primary functions for which the position exists.

Mental/Cognitive Requirements

How much on-the-job time is spent in the following mental/cognitive activities? Show the amount of time by checking the appropriate boxes below.

Analyzing information or data	1/3 to 2/3
- Essential or Marginal?	Essential
Effective communication skills	Over 2/3
- Essential or Marginal?	Essential
Composing & comprehending communication materials	1/3 to 2/3
- Essential or Marginal?	Essential
Establishing effective interpersonal relationships	Over 2/3
- Essential or Marginal?	Essential
Adjusting to changes (work load, environment, department structure, etc.)	1/3 to 2/3
- Essential or Marginal?	Essential
Using logic to define problems, collect information, establish facts, draw valid conclusions, etc	1/3 to 2/3
- Essential or Marginal?	Essential
Making decisions of moderate to substantial consequence	1/3 to 2/3
- Essential or Marginal?	Essential
Performing mathematical calculations	1/3 to 2/3
- Essential or Marginal?	Essential
Editing reports or technical materials	1/3 to 2/3
- Essential or Marginal?	Essential
Planning and organizing (work load, schedules, events, etc.)	1/3 to 2/3

- Essential or Marginal?	Essential
Handle stressful, emotional and/or frustrating situations	1/3 to 2/3
- Essential or Marginal?	Essential
Working with numerous distractions	1/3 to 2/3
- Essential or Marginal?	Essential
Working under a time pressure and within timelines/deadlines	1/3 to 2/3
- Essential or Marginal?	Essential
Coordinating work with others	1/3 to 2/3
- Essential or Marginal?	Essential
Handling multiple assignments and priorities	1/3 to 2/3
- Essential or Marginal?	Essential
Completing work in an accurate manner	Over 2/3
- Essential or Marginal?	Essential
Concentrating - maintaining attention to details and task	Over 2/3
- Essential or Marginal?	Essential
Memory functions (remembering names, details and procedures)	Over 2/3
- Essential or Marginal?	Essential

Physical Requirements

How much on-the-job time is spent in the following physical activities? Show the amount of time by checking the appropriate boxes below.

Remaining in a stationary position	1/3 to 2/3
Traverse/move locations	Under 1/3
Ascend or descend between floors	Under 1/3
Reach with hands and arms	1/3 to 2/3
Ascend or descend ladder	None
Position self to access small or restricted spaces	None
Communicate or exchange information	Over 2/3
Detect specific flavors or odors	None

Does this job require that weight be moved or force be exerted? If so, how much and how often? Check the appropriate boxes below.

Weight lifted or force exerted: up to 10 pounds (with or without assisted device) Under 1/3

Weight lifted or force exerted: up to 25 pounds (with or without assisted device) Under 1/3

Weight lifted or force exerted: up to 50 pounds (with or without assisted device) None

Weight lifted or force exerted: up to 100 pounds (with or without assisted device) None

Weight lifted or force exerted: more than 100 pounds (with or without assisted device) None

Please check one of the following Light physical activity performing non-strenuous daily activities.

Does this job have any essential vision requirements? Check all that apply. Close vision (clear vision at 20 inches or less)

Work Environment

How much exposure to the following environmental conditions does this job require? Show the amount of time by checking the appropriate boxes below.

Wet or humid conditions (non-weather) None

Extreme cold (non-weather) None

Extreme heat (non-weather) None

Outdoor weather conditions None

Work near moving mechanical parts None

Work in high, precarious places None

Air Contamination (i.e., dust, fume, smoke, toxic conditions, disagreeable odors) None

Toxic or caustic chemicals None

Work with explosives None

Risk of electrical shock None

Vibration (i.e. operating jackhammer, impact wrench) None

Risk of radiation None

Confined Spaces None

Please check one or more of the following locations where this job would work Well-lighted, heated and/or air-conditioned indoor setting with adequate ventilation.

How much noise is typical for the work environment of this job? Check the appropriate level below. Moderate noise (examples: business office with computers and printers, light traffic)

Additional Information

Include any other physical, mental or environmental information that will aid in the preparation of an accurate description of this job.

Position Documents

No documents have been attached.