Job Title: Student Accounts Specialist-Undergraduate

Department: Student Financial Services

Supervisor or Manager: Bursar

Date Created: 7/25/2005  Last Revised: 7/25/2005  FLSA Status: NE

Our Mission: It is the mission of Saint Michael’s College to contribute through higher education to the enhancement of the human person and to the advancement of human culture in the light of the Catholic faith.

Major Objectives:
- Accurate student account billings for undergraduate students are ensured; student accounts reflect proper balances and comply with College policies
- Perkins loan records of in-school borrowers are maintained and compliance with federal regulations is ensured

Essential Duties and Responsibilities:
- Applies tuition-related fee to all undergraduate students in a timely and accurate manner
- Communicates properly with parents and students concerning student account balances and related issues
- Ensures Financial Aid disbursements (including loans) and other payments such as lock box and 3rd party pay plan servicer
- Handles difficult or unusual problems with student accounts in a timely and accurate manner
- Compares and corrects differences in the student accounts records with records from the Registrar, Financial Aid, and Student Life offices
- Watches credit balances to ensure timely refunds in accordance with Federal regulations
- Monitors account balances on an ongoing basis; identifies balances that need to be held for registration or additional collection efforts
- Initiates both entrance/exit counseling for Federal Perkins Loan in accordance with Federal regulations
- Coordinates with Financial Aid personnel to ensure Perkins promissory notes are properly executed within federal guidelines

Secondary Responsibilities:
- Records cash receipts received from lock box servicer
- Supervises student account work-study program
- Cross trains with graduate Student Account Specialist and provides coverage as needed
- Performs special projects within Student Financial Services department on as-needed basis

Positions Supervised:
- Work-study student(s)

Major Contacts:
- Students/parents
- Financial Aid staff members
- Chittenden Bank (lock box payments)
- Registrar’s office
- Student Health Insurer
- Student Life office
- AMS (3rd party pay plan)
- Student Financial Services office

- Campus partners
- Study Abroad Director
Demonstrates Excellence:
• Thoroughly comprehends billing, collections, College tuition policy and related procedures
• Clearly understands how Datatel interrelates with other campus offices such as Registrar, Student Life and Financial Aid
• Excels at customer service and staying well organized, works independently with strong problem solving and communication skills

Education and Work Experience:
• Associate’s degree or equivalent combination of education and experience
• Some accounting/business and collections experience preferred, customer service experience required
• Strong computer skills in a networked Windows environment required
• Federal Regulatory experience preferred, but not required

Analytic Skills:
• Some analysis of cause-and-effect problems based on a standard approach learned through training, established policy, or the use of established procedures.

Language and Literacy Skills:
• Reads and interprets documents such as operating instructions, procedure manuals, and College policies to guide own behavior. May need to spend substantial time on the telephone or in meetings to gather necessary information and plan projects. May need to respond to questions and solve problems for people using communication skills. Has the demonstrated ability to prepare or revise written reports or other documents.

Computer/Technology Skills:

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Licenses, Certifications and Other Requirements:
• Notary Public Services

Physical Demands:
Work is often performed in a typical office environment requiring:
• Sitting in a normal seated position for extended periods of time
• Reaching by extending hand(s) or arm(s) in any direction
• Dexterity sufficient to manipulate objects with fingers, for example operating a computer keyboard
• Communication skills using the spoken word
• Vision sufficient to see within normal parameters
• Hearing sufficient to hear within normal range
• No or very limited physical effort
• No or very limited exposure to physical risk
While performing the duties of Student Account Specialist, the employee may occasionally be required to lift up to 10 pounds.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with a disability to perform the essential functions.

**Additional Requirements for the Job:**
- Knowledge of privacy laws surrounding educational environment
- Ability to organize own work flow and set priorities in duties to be accomplished
- Must be customer service driven and able to handle difficult situations around student account matters and collections

The above job description in no way states or implies that these duties are the only duties performed by this employee. The incumbent is expected to perform other related duties necessary for the effective operation of the College.