

JOB DESCRIPTION

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| Position | Enrolment Services Specialist – Financial Support | | |
| Classification | Band 10 (Provisional) | Date | October 2018 |
| Dept | Enrolment Services | Job Category | Stand alone |
| Reporting To | Manager, Student Financial Accounts | Group | CUPE |

PURPOSE:

Enrolment Services is the first point of contact for students and has an atmosphere of action oriented, friendly, and reliable service with a focus on enhancing customer service by using problem solving skills. The Enrolment Services Specialist - Financial Support will work as a team of employees who will ensure the timely and accurate processing of matters impacting student financial accounts including scholarships and awards, bursaries, tuition waivers, student loan processing, journal entries, and collection of student accounts

SPECIFIC RESPONSIBILITIES:

The incumbent will be primarily responsible for either Student Accounts/Collections or Financial Aid/Awards and will work closely and provide support to the individual primarily responsible for the other area.

A. Student Accounts/Collections

Student Accounts Receivable: Ensure the ongoing accuracy of student account balances in accordance with CBU policies and subsequent collection of funds owing CBU. Key duties will include:

- Prepare or authorize student account refunds in accordance with CBU policy.
- Prepare student financial correspondence as required (sponsor letters, monthly statements, financial information outlining costs and policies, etc.).
- Process student interest.
- Process student tax receipts (T2202As; T4As; etc).
- Process tuition waivers (dependents, staff, seniors) in accordance with CBU policy.
- Monitor student information on CBU website to ensure accuracy.
- Maintain and reconcile Students’ Union health & dental plans, international health plans, meal plans, and residence charges.
- Posting of student athletic awards.
- Prepare student account adjustments as required.
- Posting of scholarship and bursaries to student accounts.
- Authorize exemption of financial penalties in accordance with CBU policies.
- Prepare and follow-up on invoices for sponsored students.
- Support the training of Enrolment Services Professionals on financial issues.

Collections: Lead collection efforts for student accounts receivable. Key duties will include:

- Responding to enquiries from students and authorized individuals.
- Ensuring regular communications with students concerning payment obligations and awareness of CBU's account collection policies.
- Implementation of collection policies including issuance of collection letters, managing payment arrangements, processing of student de-registration as necessary, and referrals to account collection agencies.
- Counsel students on possible courses of action to ensure maximum collection of student receivables.
- Follow-up with students regarding NSF cheques.
- Recommend cancellation of residence accommodations and/or meal plans to Residence Manager/Manager of Chartwells.
- Disburse grant cheques from relevant agencies.
- Process student loan receipts.
- Prepare daily cash summaries, daily cash deposits, and monthly cash summaries.
- Reconcile visa and other accounts.

Other general work and duties as assigned including but not limited to the maintenance of statistics, reviewing and updating forms and materials, ensuring website information is accurate and up to date and maintaining relevant documentation in the SIS.

B. Financial Aid/Awards

Financial Aid (student loan and bursary programs): Provide information and counsel concerning available financial aid while ensuring the timely processing of student loan documentation and approved scholarships/awards/bursaries awarded to students. Key duties will include:

- Remaining current on national and provincial regulations concerning student financial aid programs.
- Support the training of Enrolment Services Professionals on the counselling of prospective and current students in the on-line application procedures for assistance under the Canada, provincial, and U.S. student loan programs, including the relevant appeal processes.
- Provide students with information concerning relevant student financial aid programs.
- Liaise with national, federal, and provincial representatives as required.
- Maintain, record, and administer the CBU emergency loan and bursary programs in accordance with CBU policies.
- Work to support the Manager, Enrolment Services (Process Operations), Manager of Student Financial Accounts, and Secretariat of the Awards Committee in assessing students' needs and eligibility for awards and bursaries.

Scholarships and Awards (University Medals): As directed by the Awards Committee (consisting of the Registrar and Deans), coordinate the CBU Scholarship and Awards Program.

- Coordination of CBU Scholarship and Awards Program including tracking of awards, promotion of available awards, and coordinating nomination process.
- Coordinate the presentation of graduation awards at the President and Vice-Chancellor's dinner while ensuring production of trophies, plaques, and medals with accurate inscriptions.
- Administer the CBU Work Study Bursary program in accordance with university policy.

Other general work and duties as assigned including but not limited to the maintenance of statistics, reviewing and updating forms and materials, ensuring website information is accurate and up to date and maintaining relevant documentation in the SIS.

QUALIFICATIONS:

- Baccalaureate degree, including successful completion of accounting courses, and a minimum of five (5) years' relevant experience is required. An equivalent combination of education and experience will be considered.
- Experience in a business and/or academic environment working with accounting functions, accounts management and/or client support programs.
- Highly motivated, focused, and results-orientated with the ability to meet expectations in a fast-paced and dynamic customer-service oriented environment.
- Demonstrated leadership and problem solving skills.
- Demonstrated ability to maintain confidentiality and privacy.
- Knowledge of or willingness and aptitude to learn and apply CBU academic and financial regulations.
- Excellent interpersonal and communication skills with tact and cultural sensitivity.
- Ability to work in a team environment and maintain good working relationships with other university employees.
- Proficiency in a second language reflecting CBU's international student enrolment would be considered an asset.
- Familiarity with Canadian and provincial student loan policies, privacy legislation and CRA regulations would be considered an asset.
- Irregular hours and/or a flexible work schedule, including weekends and evenings, may be required.