

## Job Description

(For Positions in CAW Local 555, Unit 1)

*Job descriptions do not include every duty that an individual in a position performs. They are intended to be representative and characteristic of the duties required and the level of work performed. Depending upon the size of the department or unit and its functional activities, incumbents who fall into this category may perform all of the duties listed below or, in the case of large departments or units, may be assigned to designated specialized functions.*

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JD #:	<b>JD00374</b>	Pay Grade:	<b>7</b>
JD Title:	<b>Customer Service Coordinator, Student Accounts and Cashiers</b>	JD FTE Hours:	<b>35</b>
Job Family:	<b>Accounting</b>		

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### General Description

Responsible for coordinating and providing individual and ongoing financial counselling to students as it relates to their financial health at the University. Prepares reports for the collections and recovery process. Requires a strong knowledge of department and University policies and procedures.

### Representative Duties & Responsibilities

- Create, update, and maintain rotating schedules including staff vacation, events, seasonal staffing adjustments, and monthly flex hours, and prepare reports for review by manager.
- Liaise between staff and manager and participate in resolving staff issues.
- Plan and coordinate a variety of events and activities such as training sessions, meetings and information sessions.
- Provide back up administrative and cashier support in the absence of staff.
- Create, edit, and update a variety of documents such as website information, brochures, posters, bookmarks, signage, and online messaging.
- Develop and deliver financial presentations at various University events.
- Initiate and implement inter-departmental efforts to improve communication with students.
- Identify and recommend improvements to departmental processes and policies.
- Investigate, analyze, calculate, adjust and explain account activity to others.
- Identify the most appropriate financial assistance available to a student, and work with other departments to facilitate the process.
- Develop, cultivate, and maintain working relationships with a variety of stakeholders internal and external to the University.
- Receive, read and comprehend a variety of documents such as bankruptcy, consumer proposals, and credit counselling forms.
- Answer general inquiries and respond independently to inquiries that are specific in nature which require a thorough knowledge of established policies and procedures.
- Provide one-on-one solutions and advice to students requiring assistance managing their financial responsibilities.
- Update and maintain confidential files and records. Handle sensitive material in accordance with established policies.
- Review, assess, and approve various financial settlement agreements up to a predetermined monetary limit.
- Customize deferred payment plans while weighing the risk to the University.
- Review the performance of collection agencies and conduct new business interviews for potential request for proposals.
- Review outstanding accounts, prepare and disseminate warning letters, final demands and follow-up communications for students who have accounts that are eligible to be sent to collections.
- Monitor and respond to the collections email account.
- Liaise with the representatives from the collection agency and various vendors.
- Investigate, analyze, and decipher written-off accounts from the point of origin of debt to settlement and the facilitation of appropriate payment.
- Prepare monthly direct payment reports and reconcile accounts.
- Write and modify queries to access multiple tables of data.

## **Representative Duties & Responsibilities**

- Monitor inventory and order supplies.
- Complete online work orders and requisitions.
- Transfer petty cash floats to and from the vault.
- Count and balance cash floats.
- Conduct unannounced cash counts of imprests to ensure they are managed effectively.
- Provide access to keys required to open the vaults.

## **Supervision**

- Provide lead hand supervision and is responsible for the quality and quantity of work of others.
- Ongoing responsibility for supervising up to 9 casual employees at any one time.

## **Qualifications**

- 2 year Community College diploma in Financial Administration or related field.
- Requires 4 years of relevant experience.

## **Effort**

### **Physical Effort:**

- A typical work day consists of greater than 3.5 hours of low physical effort for activities such as:
  - Intermittent periods of keyboarding to compose letters and correspondence and input data into spreadsheets and databases.
- Elements of moderate physical effort are not a regular feature of this job.
- Elements of high physical effort are not a regular feature of this job.

### **Mental Effort:**

- A typical work day consists of up to 2 hours of routine mental effort for activities such as:
  - Collecting routine information to prepare routine documents, responding to inquiries, and inputting data into spreadsheets and databases.
- A typical work day consists of greater than 3.5 hours of moderate mental effort for activities such as:
  - Interviewing, assessing, and providing advice to students regarding financial issues.
  - Assessing and evaluating the information provided during the interview process.
  - Conducting analyses to determine the most appropriate and effective financial assistance options available to students.
  - Identifying and recommending improvements to departmental processes and policies.
  - Writing and modifying queries to access multiple tables of data.
  - Responding independently to inquiries that are specific in nature and require a thorough knowledge of policies and procedures.
- A typical work day occasionally requires high mental effort for activities such as:
  - Assessing the financial risk to the University and making a decision to accept uncommon payment plans.

## **Working Conditions**

### **Physical Environment:**

- There are no adverse physical environment conditions inherent to the job.

### **Psychological Environment:**

- Occasionally interacts with individuals who may be rude or upset.
- Frequently handles multiple or simultaneous deadlines.

### **Health & Safety:**

- Risk to the incumbent is no higher than for the general population.

# Job Description Rating Sheet

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JD #:	<b>JD00374</b>	Pay Grade:	<b>7</b>
JD Title:	<b>Customer Service Coordinator, Student Accounts and Cashiers</b>	Total Points:	<b>456</b>
Job Family:	<b>Accounting</b>		

Factor	Subfactor	Level Rating	Points
<b>Skill</b>	1. Applied Reasoning and Analytical Skills	<b>4.0</b>	83
	2. Breadth of Knowledge	<b>2.0</b>	13
	3. Adaptation to Change/Updating of Learning	<b>2.0</b>	12
	4. Interpersonal Skill	<b>3.5</b>	46
	5. Education and Experience	<b>D3</b>	60
	6. Dexterity and Coordination	<b>2.0</b>	12
<b>Effort</b>	7. Physical Effort	<b>1.0</b>	3
	8. Mental Effort	<b>3.0</b>	55
<b>Responsibility</b>	9. Planning and Coordination	<b>3.0</b>	46
	10. Responsibility for Others	<b>3.0</b>	55
	11. Accountability for Decisions Actions Affecting People, Assets, and Information	<b>2.5</b>	53
<b>Working Conditions</b>	12. Physical Environment	<b>1.0</b>	3
	13. Psychological Environment	<b>2.0</b>	10
	14. Health and Safety	<b>1.0</b>	5