



Job Description

Job Title: Student Financial Services Representative

Department: Finance (Controller/Bursar Office)

Job Category/FLSA Status: Financial Services/Non-Exempt

Accountability: Controller/Bursar

Authority: N/A

Position Description:

The Student Financial Services Representative (SFSR) is responsible for managing and performing the daily operations of the student financial services and cashiering operations areas promptly to ensure efficiency as a working manager and/or work leader. The SFSR will assure that all directives from the CFO and the Controller/Bursar are carried out timely and that federal and state regulations regarding student accounts are met in a timely manner, including but not limited to student financial entries to student information systems (SIS) for tuition, fees, waivers, exemptions, payments, deposits, refunds, and management of federal and state scholarship cash are implemented properly. Under the leadership of the Controller, this position will provide support to other school officials at all levels on matters pertaining to student accounts, including providing technical advice in the application of compliance and policies and procedures.

Major/Essential Functions:

- Assists in the maintenance of SIS tables for system registration codes including tuition, fee codes, schedules per term, calendar/schedule set-up covering refund schedules, percentages, waiver set-up, 3rd Party codes set-up, grant (G-code) set-ups and others.
- Assists students with understanding their charges for tuition, fees, books, etc., including Title IV aid and loans paid onto accounts and any other payments made to their accounts.
- Performs student account management functions including but not limited to, reconciliations, postings, refunds and billing, including working in tandem with the Student Financial Aid and Scholarships (SFAS) department to determine any financial aid residuals that could be applied to those students who qualifies.
- Works with the Office of the Registrar and SAFS to ensure students accounts are accurate.
- Sets-up and maintains all item types capturing all student account transactions (charges, payments, awards, waivers, refunds, and adjustments) in sequence to properly ensures SIS (General Ledger) interfaces with the accounting system (General Ledger) General Ledger.
- Reviews, monitors and ensures deposits of all receipts are accurate and timely.
- Assists in the use and maintenance of CBS on-line and in-line cashiering system, including the Installment Payment Plan System.
- Assists in management of federal cash including Title IV drawdowns and cash returns through the U.S. Department of Education's Grant Management website.
- Assists in the development, maintenance, and updates of department websites.

- Ensures the integrity, quality, and accuracy of financial and billing data in the student information system (Populi) and compliance with federal, state and other regulatory financial controls and audit requirements.
- Ensures compliance with the Family Education Rights and Privacy Acts (FERPA) as it relates to the assigned areas of responsibility.

Duties/Responsibilities:

- Proactively contacts students by phone, email, text, etc., to encourage them to create a means of paying their bills.
- Handles disbursement of funds, monetary transactions, cash or check payments, and credit card charges.
- Processes stipends/refunds for students and liaises with Business Office for timely payments to students.
- Counts money, accurately handles financial transactions, issues receipts, and conduct payment reconciliation.
- Assists in developing communication to encourage students to complete financial aid paperwork, set up payment plans, pay balances, etc.
- Performs general office duties as needed, including data entry, phone responses, and walk-in/call-in customer service for the Finance-Student Financial Services Office.
- Ensures all work is in compliance with CBS policies and procedures and all state and federal guidelines and laws.
- Gathers routine information from other administrative, maintenance or clerical employees and outside vendors, customers, or the public.
- Responds to a variety of inquiries from all levels of employees or external sources, using a variety of communication methods including in-person, online chat, phone, and video conference.
- Prepares general correspondence and conducts other administrative duties to support the department.
- Manages the accounting of all students financial transactions and the maintenance and accounting of CBS' Loan and Scholarship Funds.
- Prepares student payments (e.g., refunds), including initiating and processing invoices, vouchers, procurement card transactions, or transactions by similar electronic payment methods.
- Receives cash, checks and credit card payments. Balances and closes cash drawers. Reconciles cashier activity. Endorses checks and codes for the accounting system.
- Assists in the coordination of the student accounts receivable program to encourage both current and former students to a financial resolution.
- Processes and sends invoices to third party payers. Follows up on unpaid accounts. Provides assistance to external agencies regarding billing and specific student issues.
- Participates in department meetings, including student recruiting and orientation meetings.
- Ensures compliance with all related institutional policies and procedures.
- Assists in the review and issuance of IRS Form 1098T to students and reporting to IRS.
- Performs related duties as required.

Required:

- Associate's degree from an accredited institution of higher education and 2 years of financial accounts management including financial aid, student accounts processing, customer support, or the equivalent and accounting or bookkeeping.
- The Student Financial Services Representative must be a highly energetic, customer service-oriented individual effective at working independently and delivering high-quality work. In addition, he or she should:
 - Be outgoing and positive,
 - Accepting of responsibility,
 - Intent on serving customers and
 - Supportive of organizational goals.
- They must have the ability to:
 - Drive continuous improvement,
 - Act with integrity,
 - Think critically,
 - Manage change well, and
 - Communicate effectively.
- Be a committed Christian and in good standing with a local church.
- Be in complete agreement with the doctrinal position (items 1-8) of the college and able to sign its doctrinal statement without reservation.

Preferred:

- Associate's degree from an accredited institution of higher education and 4 years of experience working with student accounts or general accounting in a computerized multi-cost center environment.
- Bilingual in English and Spanish (reading, writing and speaking).

Equipment/Skills/Knowledge needed to perform job (i.e., Vehicle, MS Word, License, etc.):

- Ability to focus on detail while maintaining effective time and task management.
- Ability to effectively communicate verbally and in writing on a regular basis with internal and external customers, build relationships, manage customer expectations, and take responsibility for a high level of service.
- Ability to interact in a positive manner with diverse populations and varying education levels of students, faculty, staff, and the public.
- Ability to read and interpret documents such as safety rules, operating and maintenance instructions and procedure manuals. Ability to write routine reports and correspondence.
- Ability to add, subtract, multiply and divide in all units of measure using whole numbers, common fractions, and decimals.
- Ability to compute rate, ratio and percent and to draw and interpret bar graphs.
- Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.
- Ability to interpret a variety of instructions furnished in written, oral, diagram or schedule form.
- Proficiency in Microsoft Office Business desktop tools to include Word, Excel, PowerPoint and Outlook, as well as electronic communications such as e-mail, calendars, information management systems, Generally Accepted Accounting Principles (GAAP), etc.
- Ability to learn various software and systems as required by the college or service providers.

- Knowledge of FERPA and other applicable laws.

Measurable Expectations/Fiscal Responsibilities (i.e., Quarterly Reports, Annual Events, Etc.):

- Prepare annual, quarter, monthly, and weekly reports for internal and external constituents including reporting of goal process and outcomes. Prepare periodic management reports and assist with preparation of reports required by state or federal agencies and annual audit work papers.
- Manage student account payment deadlines in accordance with the academic catalog, ensuring transparency and accountability of information to improve students' overall academic success.
- All additional measurements of expectation and performance will be designed, documented and implemented as deemed appropriate to this position.

Mobility/Physical Demands:

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 disabilities to perform the essential functions.

- Employee must sit, stand and walk and use manual dexterity and fine motor skills.
- Employee must be able to reach and grasp objects and utilize video display terminal.
- Employee must talk and listen via face-to-face contact and telephone.
- Employee may be required to lift and/or move up to 10 pounds.

Working Conditions/Environment (i.e., Necessary Travel, Unusual Hours, Etc.):

- Ability to work flexible hours; some weekend work required to meet project deliverables.
- Materials, conversations, and some meetings may be of a confidential and sensitive nature.
- Typical office/higher education institutional environment at CBS onsite location or remote/office hybrid option available as determined by supervisor and institutional policies and procedures.

Security Sensitive: Yes

Statements herein are intended to describe the general nature and level of work being performed by employees and are not to be construed as an exhaustive list of responsibilities, duties, and skills required of personnel so classified. Furthermore, this job description does not establish a contract for employment and is subject to change at the discretion of CBS.

Believing that God values and calls men and women from every language, people and nation into His kingdom, CBS is committed to cultivating and maintaining an ethnically diverse educational and work environment that motivates and retains God's chosen individuals. CBS does not discriminate on the basis of race, sex, color, age, national or ethnic origin, veteran, marital status, or physical or mental disability in the administration of its employment policies except as such conditions may constitute bona fide occupational or assignment limitation.