



Classification Description

Job Title: Student Account Specialist

Pay Grade: 105

Job Code: 3774

FLSA Status: Non-Exempt

Job Purpose

This is specialized work computing, classifying, recording, and verifying numerical data for use in maintaining accounting records within the Office of the Bursar. The Student Account Specialist is responsible for assisting students with detailed financial matters while also providing exceptional customer service to students, faculty and staff.

General Responsibilities

Essential Functions

Balances daily receipts and credit card transactions as well as preparing daily cash and check recapitulation and reporting of daily operations for FSW State College and FSW Collegiate High Schools using the Banner System.

Performs complex cashiering functions for student accounts following specific College procedures and policies. Must be familiar with College billing and refund policies, institutional and FERPA confidentiality regulations, and Federal Title IV cash management regulations

Provides outstanding support to students and staff in a variety of student account functions regarding processing payments, assisting with tuition fees and financial aid adjustments, cash/credit card payments, financial aid, Military Tuition Assistance and Veteran's Benefits

Provides technical assistance to students, staff, managers and the general public regarding: fee assessment; accounts receivable policies and procedures on payment, billing, refund and collection; general assistance on academics, registration, financial aid disbursement procedures, operational hours, installment plans, 1098T tax forms and College policies.

Handles a variety of difficult customer situations using tact, diplomacy and patience, both in person and over the phone.

Processes employee tuition waivers by verifying amounts and applying payment to the student's account in Banner.

Assists with contacting and notifying student regarding unclaimed refunds or undefined refund preference through the BankMobile program.

STUDENT ACCOUNT SPECIALIST

Compiles and sorts documents, such as invoices and checks; posts related payments as necessary; creates and maintains related files and records.

Prepares and consistently updates the Student Accounts Services Office Procedures Manual for all areas of Student Accounts Services responsibility.

Ensures cash receipts are safeguarded, applied to the proper account, and deposited in the College's bank in an accurate and timely manner. Assists with preparing deposits and transfers of currency and checks via armored transport to bank and central cash vault, maintaining a high level of security.

Researches and resolves student issues related to the Student Accounts Services Office. Elevates issues to the supervisor as needed for final resolution.

Distributes campus payroll checks sent to Student Account Services from the Payroll Office for employees receiving a check.

Balances cash drawers as necessary.

Processes staff petty cash transactions and posts miscellaneous department revenue to finance system. Disburses money; verifies accounting distribution, supporting receipts and authorizing signatures. May maintain campus records of petty cash transactions for audit purposes.

Reconciles complex cash receipts accounting report of all student, staff and merchant transactions on a daily basis.

Assesses the student's individual need; provides required forms, advises on required actions, refers to appropriate departments.

Ensures that relevant information is posted and visible to students, staff and the general public. Includes assisting management with web updates, communications management updates, and office communications.

Responsible for representing Student Accounts Services at important events such as Orientation and Open House.

Assists the supervisor with the development and maintenance of procedures for the Student Account Services department. Ensures compliance with local, state and federal regulations related to the College's Student Account Services Office's functions by reviewing policies, procedures and processes to ensure they are in compliance with applicable regulations.

Performs other duties as assigned.

STUDENT ACCOUNT SPECIALIST

These essential job functions are not to be construed as a complete statement of all duties performed; employees will be required to perform other job related duties as required. An employee with a disability is encouraged to contact the Human Resources Office to evaluate the job in greater detail in order to determine if she/he can safely perform the essential functions of this job with or without reasonable accommodation.

Knowledge, Skills and Abilities

Minimum Qualifications

Associates degree from a regionally accredited institution of higher education.

One (1) year of full-time or two (2) years of part-time appropriate professional work experience in accounting or related field. Appropriate combination of education and experience may be substituted.

Demonstrated experience using a personal computer, office software such as MS Office (MS Word, MS Excel) and electronic mail.

Ability to independently travel to all FSW campuses in Lee, Charlotte, Collier and Hendry counties and perform all duties referenced above, as needed.

Demonstrated ability to:

- Think critically and creatively, have a high standard of integrity, and be motivated to incorporate best practices into the organizational culture.
- Exhibit a thorough knowledge of policies, procedures, and outside regulations pertaining to the position.
- Possess a working knowledge of operational and fiscal analysis techniques.
- Make presentations in front of various group sizes.
- Take initiative and independently plan, organize, coordinate and perform work in various situations where numerous and diverse demands are involved.
- Anticipate, investigate, and analyze problems and address them proactively.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with faculty, staff, students and the public.
- Work in a fast-paced, demanding environment.
- Work independently and follow through on assignments.
- Exhibit solid organizational skills and be detail oriented.
- Work with a variety of constituencies and be willing to contribute to a team effort.
- Exercise discretion and good judgment at all times and in all contexts and maintain confidentiality.
- Work effectively with all constituencies of the College.
- Collect, organize, analyze and present information in a meaningful manner.
- Collaborate and be effective working with diverse populations.

STUDENT ACCOUNT SPECIALIST

Critical Skills/Expertise

All employees are expected to:

- Promote a common purpose consistent with stated College goals and demonstrate a commitment to students and the learning environment.
- Possess the knowledge of general written standards and procedures utilized, and have the ability to read, interpret, and follow procedural and policy manual related to the job tasks.
- Demonstrate the ability to respond to supervision, guidance and direction in a positive, receptive manner and in accordance with stated policies.
- Provide quality customer service by creating a welcoming and supportive environment.
- Present a professional image in word, action and attire.
- Demonstrate professionalism in dealing with a diverse population while understanding and respecting each other's view of the world, personalities and working styles.
- Conduct oneself in a manner consistent with the College's standards of ethical conduct.
- Apply effective techniques to create working relationships with others to achieve common goals; successfully communicates and collaborates with others to achieve goals.
- Demonstrate skills necessary to look at situations and processes critically to make recommendations for improvement.

Work Conditions/Physical Demands/Special Conditions

Physical: Routinely requires the ability to see, hear, and speak. Routinely requires sitting, bending, stooping, walking. On occasion, incumbents may be required to lift 20 or more pounds.

Environmental: Normal general office.

Mental: Routinely requires the ability to interpret, analyze and perform critical thinking skills.

Approved: May 22, 2018. Revised: July 1, 2023.