

STUDENT ACCOUNTS SPECIALIST

DISTINGUISHING FEATURES OF THE CLASS: This position is responsible for performing both complex clerical and account keeping tasks. The incumbent performs student account keeping and record keeping while interpreting and applying various Federal, State, County and institutional regulations. The work requires the development of knowledge of all financial issues including financial aid, determining students' disbursement eligibility and using the appropriate student account keeping practices. The position involves extensive public contact and incumbents must respond to a wide variety of telephone and in-person inquiries. The work is performed under general supervision with wide leeway allowed for the use of independent judgement in carrying out the details of the work. Does related work as required.

TYPICAL WORK ACTIVITIES:

Advises students on financial matters relating to financial aid;
Determines students' eligibility for disbursement of financial aid based upon the specific criteria stated for each type of program;
Prepares and checks all documents necessary for financial transactions related to student account keeping;
Computes disbursements for those students who have been deemed eligible for financial aid;
Counsels students regarding how attendance, grades, completion of courses, etc. impacts the disbursement of their financial aid;
Prepares, reviews and monitors a variety of complex financial documents for accuracy and completeness;
Acts as liaison to the various agencies regarding the financial component of educational support programs such as VESID, JPTA, The Department of Military & Naval Affairs and the Broome County Office of Employment & Training;
Responds to telephone and in-person inquiries regarding students' financial status including financial aid, grants, loans and 3rd party billings;
Creates, updates and maintains various student files and statistical records;
Prepares moderately complex reports;
Receives updates on financial aid as well as various other policies and procedures and incorporates them into the office's current activities;
Prepares independently correspondence, form letters and mailing lists;
Operates calculator, computer terminal, typewriter and other related office equipment.

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES & PERSONAL CHARACTERISTICS:

Thorough knowledge of modern methods used in preparing and checking financial documents and records relating to student accounts;
Thorough knowledge of the various types and content of financial aid available to students;
Thorough knowledge of office terminology, procedures, equipment and business English;
Ability to accurately make complex arithmetic computations involving

fractions, decimals and percentages;
Ability to organize, analyze and maintain accurate records and files;
Ability to learn, understand and interpret numerous laws, rules and regulations pertaining to financial aid and student account keeping;
Ability to effectively utilize the computerized student account keeping system;
Ability to develop effective working relationships and deal diplomatically with the others;
Ability to understand and carry out complex oral and written directions;
Ability to perform close, detail work involving considerable visual effort and strain;
Clerical aptitude;
Good judgement;
Accuracy;
Courtesy;
Tact.

MINIMUM QUALIFICATIONS:

- (A) Graduation from a New York State registered or regionally accredited college or university with an Associate's Degree in accounting, business, or a closely related field and two years of experience maintaining financial accounts and records; OR
- (B) Completion of 60 credit hours at a New York State registered or regionally accredited college or university which must have included at least eight credit hours in accounting or bookkeeping and two years of experience maintaining financial accounts and records; OR
- (C) Graduation from high school or possession of an equivalency diploma and four years of experience maintaining financial accounts and records; OR
- (D) An equivalent combination of training and experience as defined by the limits of (A), (B) and (C) above.

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COMPETITIVE