

Position Description - Unclassified
Position Status:

Position Title		Position Number
Assistant Bursar		E99955
Appointment (9mos. / 12 mos. / Other)	Contract Period (from / to)	Department / Division
12 months	-	Accounting & Business Services
Position Type	FLSA	
Unclassified	Exempt	
Reports to	Reports to Position Number	
Banner Information Systems Auditor/Bursar	E99702	
Incumbent	University ID #	

Program Information:

A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.

This position is in the Western Oregon University Accounting & Business Services (ABS) Office. ABS is responsible for the financial management of the institution and processing and reporting for all financial transactions. The operation of the ABS Office directly affects each of the institution's employees, students, suppliers, student sponsors, some employees of other state agencies, and some members of the public. The ABS Office has thirteen employees, excluding student employees and temporary hires.

B. Describe the purpose of this position and how it functions within this program.

The purpose of this job/position is to oversee the student financial service staff in ABS, comprised of reception, cashier, collections, and reconciliation. This position assists the Bursar/Banner System Auditor with the student accounts receivable functions of the University.

Position Information and Qualifications:

A. Description of Duties/Responsibilities – List the major duties assigned to the position. Note percentage of time each listed duty is performed to total 100%. Indicate “E” = Essential, “R” = Revised

Percent of Time	Duties
40%	<ul style="list-style-type: none"> ● Retain supporting documents for receivable charges. ● Responds to debtor and departmental receivable questions ● Responsible for generating and mailing monthly billings ● Responsible for file maintenance and receivable data entry ● Recommends and implements changes to receivable systems and policy ● Runs appropriate processes to keep accounts current (interest, late fees, holds, etc.) ● Process registration holds ● Process bankruptcy paperwork ● Process rate code paperwork associated with GTAs, Staff, Teacher Vouchers, etc. ● Check web payments as needed for accuracy ● Balance and clear clearing funds/accounts ● Verify charges and payments are posted to correct term ● Process general receivable accounts that have been turned over to an outside collection agency ● Answers questions related to accounts that have been assigned to an outside agency ● Completes HB3509 reporting for WOU that is submitted to DAS ● Process and coordinate all third-party receivable documents ● Create and maintain the tuition and fee table
30%	<ul style="list-style-type: none"> ● Coordinate work for cashier’s, collections, A/R and financial aid accountants. ● Audit/Analyze these areas for compliance. ● Train staff. ● Ensure reconciliation is being performed in each area. ● Innovate and provide exemplary customer service.
15%	<ul style="list-style-type: none"> ● Set up and maintain all detail codes and accounts in the system. ● Coordinates with the Registrar’s Office and other offices as needed
10%	<ul style="list-style-type: none"> ● Generates SIS refunds ● Intercepts and applies institutional and state refunds to outstanding debts
5%	<ul style="list-style-type: none"> ● Other Duties as assigned

B. Required Qualifications

List any certificates, licenses, academic degrees, or experience required to perform the duties of this position. Indicate if a combination of education and experience is acceptable.

- Bachelor's degree
- 3 years accounting experience
- 1-year supervisory experience

C. Preferred Qualifications

Describe preferred education, experience, skills, licenses, certificates, and other qualifications for this position.

- Higher Ed Experience
- Ellucian Banner
- Relational Database query/audit experience
- Bilingual

D. Knowledge Areas

List the major areas of knowledge that are required to perform the duties of this position.

- Accounts Receivable
- Fair Debt Collections Practices Act (FDCPA)
- Customer Service
- Excellent written and verbal skills
- Management

Budget Authority:

Indicate the level of the position's responsibility for the development, control, and monitoring of budget. Indicate the size of the budget. Check all that apply.

<input type="checkbox"/>	Develops, monitors*, and controls* <i>*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level</i>	\$0
<input type="checkbox"/>	Delegated authority to monitor budget	\$0
<input type="checkbox"/>	Limited approval authority for purchase	\$0
<input type="checkbox"/>	Purchase only with higher level approval	\$0

Supervisory Authority:

If this position has the authority to act or effectively recommend action affecting employees in the following areas, check all that apply.

<input checked="" type="checkbox"/>	Hire	<input checked="" type="checkbox"/>	Assign Work
<input type="checkbox"/>	Transfer	<input type="checkbox"/>	Recommend salary adjustments
<input checked="" type="checkbox"/>	Discipline	<input checked="" type="checkbox"/>	Approve requests (i.e. leave)

	Dismiss	X	Respond to complaints/grievances
	Layoff	X	Conduct performance assessments
X	Promote	X	Give Direction

Positions Supervised:

Type	# of Employees	Total FTE
Teaching faculty		
Classified staff	4	4.0
Unclassified staff		
Student Employees (average per term)		
Other (specify)		

Decision Making Authority:

Describe the breadth and scope of decision-making authority and discretion the position has to formulate, implement, evaluate, approve and/or modify department and/or university policy, procedures, and/or programs. Describe the type of review and/or approval required by a higher level.

Student policy in relation to A/R and collections.

Additional Information:

List any additional information that would help describe the nature of the position.

Acknowledgement:

Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date
Appointing Authority	Appointing Authority Signature / Date

HR USE ONLY:

Received by	Date		
Position Class # (Ex. UF101)	Employee Class	Job Location	Appointment Percent
CUPA-HR# / Title	NOC Code	Category Code	SOC Code

Actions Taken			
	NBAPBUD / NBAPOSN		
	NBAJOBS		
	PEAFAC		
	Electronically Filed		