

Position Description - Classified

Purpose of the PD:

- To record the essential functions of the position
- To record special requirements
- To record required knowledge and skills to perform the duties of the position
- To record special working conditions
- To aid in recruitment and selection
- To establish Management's expectations
- To provide a base for managing performance

Position Status:

Working Title		Position Number
Collections Agent		E99553
Classification Title		Classification #
Revenue Agent 2		C5111
Position Type (FT/PT / Limited Duration)	Regular / Academic Year / Seasonal / Intermittent	FLSA Status
FT	Regular	Non-Exempt
Work Location		Department / Division
Monmouth - Polk		Accounting & Business Services
Reports to		Reports to Position Number
Bursar		E99216
Incumbent		University ID #
TBD		TBD

Program Information:

<p>A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.</p> <p>This position is in Accounting & Business Services (ABS) at Western Oregon University. ABS is responsible for the processing and reporting of all financial transactions for the university. The operation of the 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. Operations are vital to the independent operation of the institution. The office has thirteen employees, excluding students and temporary hires.</p>
<p>B. Describe the purpose of this position and how it functions within this program.</p> <p>This position has the primary responsibility for the collection of the past due accounts from former students. It assists with collections from current students and determines whether credit should be issued to individuals.</p>

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
50%	Makes contact required by Federal Loan Program regulations Arranges payment schedules for past-due accounts to bring them current Continues to track accounts and determines if payment schedules are being met Informs debtors of their responsibilities to pay amounts due and of actions the institution may take to collect debts Keeps a record of contact with delinquent accounts Skip traces debtors
20%	Makes contact with current students regarding past-due balances Advises students regarding the cost of college and supports students through financial literacy endeavors Works as a liaison with the financial aid office to provide budget scenarios
15%	Review of loan records for accuracy and appropriate collections activity Bankruptcy follow-up. File proof of claims and other supporting documents Assists with write-offs of uncollectable accounts Advises credit reporting agencies with the status of debtor’s accounts Assists in providing HB3509 collections data Negotiates partial or full settlement on delinquent accounts. Adjusts small balances on accounts once settlement payment has been made Provides required documentation within Federal guidelines to provide dispute decisions and proof of debt
5%	Regular contact with outside collection agencies when assistance is necessary
5%	Advises staff on collection matters Contacts/communicates with current and former individuals still owing money by telephone and/or writing to collect payment, encourage compliance, explain agency policies and procedures, and obtain information
5%	Other duties as assigned

Working Conditions:

Describe special working conditions, if any, that are a regular part of this job. Include frequency of exposure to these conditions.

Occasional contact with hostile individuals.

Guidelines:

List any established guidelines used to do this job, such as state or federal laws or regulations, policies, manuals or desk procedures.

Federal Uniform Commercial Credit and Collection Regulations, Oregon Revised Statutes, Administrative Services guidelines, and Administrative Rules. Western Oregon University Policies and Procedures.

How are these guidelines used to perform the job?

Written policy, procedures, and regulations provide guides for the collection process. Administrative Services and Oregon Administrative Rules are used to comply with State Collection regulations.

Work Contacts:

Who contacted	How (email /)	Purpose	How often?
Debtors	Phone/Writing/Email	Debt Collection	Daily
Collection Agencies	Phone/Writing/Email	Account Submission/Recall	Frequently
Enrolled Students	Phone/Writing/Email	Requests for Credit	Frequently
Dept of Revenue	Phone/Writing/Email	Account Submission	Frequently

Job Related Decision Making:

Describe the kinds of decisions likely to be made by this position. Indicate effect of these decision where possible.

Incorrect collection methods could result in making collection difficult or result in a negative public image. Selecting the wrong individual could result in the loss of institutional funds while being too strict could present a negative public image or prevent qualified individuals from attending school.

Review of work:

Who reviews the work of this position? (List classification title and position number). How often? Purpose of the review?

This position is reviewed by the Bursar. This review is performed once per year. Work is also audited by Internal auditors and annual compliance audits.

Additional Job-Related Information:

Any other comments that would add to an understanding of this position

This position must be able to work with irate individuals in an effective manner.

Special Requirements / Preferred Qualifications

Budget Authority: If this position has authority to commit agency operating money, indicate in what area, how much (annually) and type of funds:

None

Acknowledgement:

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

HR USE ONLY:

Received by		Date	
Position Class # (Ex. C0104)	Employee Class	Job Location	Appointment Percent
CUPA-HR# / Title	NOC Code	Category Code	SOC Code
Actions Taken			
	NBAPBUD / NBAPOSN		
	NBAJOBS		
	PEAFAC		
	Electronically Filed		