Accounts Assistant (Income)

Department: Finance
Hours of work: Full Time (37 hours per week)
Contract type: Open
Salary: £24,285 - £27,131 per year
Main purpose of the role

To work as a member of the central Finance Department, to provide an effective and responsive customer focused service to manage tuition fees, external funding, income collections and credit control duties. This will include: communicating with students regarding their financial obligations to the University; liaising with key internal and external stakeholders; liaising with non-student customers; analysing and investigation of student / customer accounts and taking ownership of the successful resolution of queries, initiating action where required in a prompt and professional manner.

To work collaboratively with a range of stakeholders in the Faculties, Professional Services as well as students and external clients to provide a seamless student facing service.

To analyse and apply knowledge of the Student Records System (SITS) and the Finance Systems (SAM/Agresso) to support the business requirements.

Key responsibilities

(Role holders will be required to undertake some or all of the duties below)

1. Role Specific Responsibilities

- Day to day management of Accounts Receivable ledger accounts i.e., student, Student Loan Company, sponsor and other customer records. To raise accurate and timely invoices to students, sponsors and customers ensuring the correct allocation and matching of receipts to customer accounts and income to budget codes. Responsibility for the collection and prompt recording of monies received, dealing with refunds, journals and manipulation of data for input files.
- Pro-active collection of the University’s outstanding debt in line with University debt control procedures including case management. Negotiation of payments and payment plan instalments with students and debtors of the University and monitoring recovery. Providing advice and maintaining relationships with students who are experiencing financial difficulties sensitively and liaising with SFSU relating to the collection of outstanding debts.
- Investigating and resolving problems/queries from students, guardians (where appropriate), ex-students and all other customers relating to invoices, credit notes, payments, refunds, scholarships, student loans and funding, bursaries, and any other discounts allowed or disallowed in line with current Financial Regulations and Fees policy.
- Receipting funds from customers and students including credit/debit card processing, cash counting, banking cheques, and associated data entry and reconciliation. Issuing, reimbursing, and monitoring the use of petty cash and cash floats, maintaining security procedures and working within the requirements of PCI standards and University Anti Money Laundering Policy.
- Liaising with staff in other departments to provide guidance and support e.g., student services, accommodation, student records in connection with problems/queries and funding issues. Appropriate signposting of students to relevant student services.
- Regular monitoring, analysis and case management of outstanding debt and fees paid by instalments, and under arrangements, ensuring all payments have been received in line with agreed arrangements.
• Dealing with students and customers with an overall view to reducing outstanding levels of debt including liaison with other University Departments when appropriate over fees that remain unpaid and resolution of any identified problems.
• Implementing the debt collection policy and understanding current debt recovery legislation. Liaising with debt collection agencies and solicitors when further action is required to collect outstanding debt. Maintaining supporting records on the debt collection portals to ensure cases are up to date and accurate. Liaising with liquidators and asset recovery companies.
• Recalculation of student fees for withdrawn and leave of absence students in accordance with University policy and ensuring compliance with external funding rules.
• Providing customer focus front line financial support and advice to students, Faculties and Professional Services maintaining student confidentiality, working within the requirements of the General Data Protection Act and the University’s Confidentiality Policy.
• Supporting systems review, testing, and process improvement across the team.

2. University of York Responsibilities for Grade 4

Service and Operational Delivery
• Use initiative to resolve queries that generally have a readily available answer by reference to policy, past experience and/or where some discretion can be applied.
• Share knowledge with colleagues and others to enable effective service or operational delivery.
• Proactively anticipate, explore and respond to customer needs and, when appropriate, propose solutions to resolve service or operational issues.
• Provide guidance and advice to resolve problems and queries for a broad range of customers.
• Make effective use of digital solutions to carry out operational activity and highlight opportunities for further efficiencies.
• Provide effective administrative support to the wider department as required. This may include the coordination of diaries, arranging and servicing meetings, filtering enquiries, drafting and preparation of documentation and organisation of travel and events.

Continuous Improvement
• Contribute to the ongoing improvement, development and implementation of University processes and systems.
• Advise others and make recommendations into work processes and procedures for consideration by senior management to improve services.
• Proactively identify opportunities for building new personal knowledge and skills.

Specialist Contribution
• Act as a more knowledgeable team member to resolve non-standard or complex queries or advise when to escalate.
• Record data and information accurately
• Analyse, manipulate and interpret information/data and use it to produce reports for distribution to key stakeholders in the process or service.
• Carry out basic analysis and research to inform decision making.

Collaboration and Communication
• Work collaboratively, proactively and flexibly with team members to ensure the smooth running of service and operational delivery.
• Collaborate with team members to anticipate and implement service improvements or alterations.
• Proactively and reactively liaise with contacts and participate in networks and communities internally and possibly externally, contributing to effective collaborative working.
• Act as a supportive and encouraging member of a team, including contributing to the training and induction of colleagues or new staff.

Governance and Oversight
• Apply knowledge of procedures and policy to processes; check and reconcile anomalies within data and information.
• Monitor and evaluate service delivery to ensure compliance with regulatory and professional procedures and standards.
• Monitor data accuracy checks to identify anomalies and ensure the integrity of data and information.

Planning and Organisation
• Plan and organise own workload, including possible project delivery.
• Organise and schedule resources, activities and events.
• Identify priorities and monitor processes and activities to ensure success.

The above list of duties is not exhaustive and is subject to change. The post holder may be required to undertake others duties within the scope and grading of the post.

Condition of Employment

This role is exempt from the Rehabilitation of Offenders Act. Consequently, all applicants will be asked to declare both unspent and spent convictions on their application form. Appointment of the successful candidate will be conditional on a Disclosure and Barring Service check.
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<tr>
<th><strong>Person specification</strong></th>
<th><strong>Essential / Desirable</strong></th>
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<tbody>
<tr>
<td><strong>Role Specific</strong></td>
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<tr>
<td>Knowledge of debt recovery procedures and processes</td>
<td>Essential</td>
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<td>Knowledge of student systems and financial systems e.g., Agresso</td>
<td>Desirable</td>
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<td>Knowledge of banking and receipting procedures</td>
<td>Essential</td>
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<td>Experience of accurately inputting high volumes of data, analysing data, and presenting summary information in a clear and concise format</td>
<td>Desirable</td>
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<td><strong>University of York Person Specification for Grade 4</strong></td>
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<td><strong>Qualifications:</strong></td>
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<td>Level 2 qualification including Maths and English. (Qualifications at this level include five GCSEs at grade A*-C/ grade 4-9. Please view the full list). We also welcome applicants with equivalent non-uk qualifications or equivalent professional experience.</td>
<td>Essential</td>
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<td><strong>Skills - demonstrates the ability to:</strong></td>
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<td>Accurately record, analyse, interpret and report information/data</td>
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<td>Use digital technologies including Google applications and/or Microsoft Office</td>
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<td>Communicate effectively in verbal and written formats</td>
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<td>Organise activities and resources</td>
<td>Essential</td>
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<td><strong>Behaviours:</strong></td>
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<td>Works collaboratively with others</td>
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<td>Delivers a quality service</td>
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<td>Develops self and others</td>
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<td>Actively champions respect, inclusivity, equality and diversity</td>
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<td>Identifies and implements continuous improvement</td>
<td>Essential</td>
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