UNIVERSITY OF SOUTHERN CALIFORNIA
Student Account Specialist
Job Code: 113909

Grade: G
OT Eligible: Yes
Comp Approval: 12/20/1994

JOB SUMMARY:
Provides counseling to students regarding their financial obligations. Serves as primary contact for students regarding inquiries and assistance with tuition interpretations.

JOB ACCOUNTABILITIES:
*Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.

<table>
<thead>
<tr>
<th>*E/M/NA</th>
<th>% TIME</th>
<th>Time Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>______</td>
<td>______</td>
<td>Meets with students and parents to explain financial obligations. Oversees signing of promissory notes to defer tuition and other charges.</td>
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<tr>
<td>______</td>
<td>______</td>
<td>Interacts with students to clarify or investigate account balances and payment terms. Communicates policies and procedures and answers general inquiries.</td>
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<tr>
<td>______</td>
<td>______</td>
<td>Reviews documents to ensure completeness and student eligibility. Prepares promissory notes. Establishes files. Processes tuition adjustments such as deferrals, cancellations and postponements.</td>
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<td>______</td>
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<td>Initiates original correspondence to students, deans and University departments.</td>
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<td>______</td>
<td>______</td>
<td>Maintains or updates database to ensure accuracy of demographic information. Processes on-line adjustments to update account balances.</td>
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<td>______</td>
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<td>Makes corrections to students records as directed by supervisor.</td>
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<tr>
<td>______</td>
<td>______</td>
<td>Prepares transmittals for deposits of cash received and adjusts billing account accordingly.</td>
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<tr>
<td>______</td>
<td>______</td>
<td>Assists other Financial Services departments during peak periods.</td>
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</table>

Performs other related duties as assigned or requested. The University reserves the right to add or change duties at any time.

EMERGENCY RESPONSE/RECOVERY:

Essential: □ No
□ Yes
In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.

JOB QUALIFICATIONS:
Minimum Education:
Related Undergraduate Study
Combined experience/education as substitute for minimum education

**Minimum Experience:**
- 1 Year

**Minimum Field of Expertise:**
- General knowledge of financial aid programs. Communication skills.

**Preferred Education:**
- Bachelor’s Degree

**Preferred Experience:**
- 2 Years

**Preferred Field of Expertise:**
- Experience in student financial processing providing a working knowledge of Department of Education regulations and procedures.

**Skills: Administrative:**
- Answer telephones
- Balance figures
- Communicate with others to gather information
- Compute totals
- Draft routine correspondence
- Input data
- Maintain filing systems
- Read handwritten text
- Research information
- Schedule appointments
- Understand and apply policies and procedures
- Use computerized spreadsheets
- Verify calculations

**Skills: Machine:**
- Adding Machine
- Calculator
- Computer Network (Department or School)
- Computer Network (University)
- Personal Computer
- Photocopier
- Typewriter

**Supervises: Level:**
- May oversee student, temporary and/or casual workers.

**SIGNATURES:**

**Employee:** ____________________________ **Date:** ____________________________

**Supervisor:** ____________________________ **Date:** ____________________________
The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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