

# The University of Texas at San Antonio

## *Job Description*

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Job Title: Financial Services Associate II  
Code: 19192  
Salary Grade: 57  
FLSA Status: Exempt  
Department/Division: Financial Services and University Bursar  
Reports To: Director of Financial Services and University Bursar

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## *Summary*

- **Function:** Serves as a senior-level front line customer service position in Financial Services, providing guidance and explaining policy and options available for our student customers.
- **Scope:** Uses initiative and independent judgment to relieve one or more administrators of administrative matters and decisions. Assists administrators in establishing and attaining departmental goals and objectives.

## *Duties*

- **Typical:**
  1. Deals with potentially difficult issues involving students and working with them to resolve outstanding issues, and presenting all options available.
  2. Counsels/advises students, both on the phone and in person, on financial and related student service issues. Modifies or removes financial holds as appropriate.
  3. Assists students and parents with questions regarding fiscal questions. Negotiates payment agreements within parameters authorized by Director or directs them to the correct departments as appropriate.
  4. Runs daily bank reports for cash management review.
  5. Coordinates comment cards for the department to determine customer service levels that are provided.
  6. Acts as a liaison with other departments and agencies regarding inventory control, building services, equipment maintenance and repair, purchasing, safety and other administrative matters.
  7. Coordinates student appeal submission packets, ensuring all required information is provided before transfer to Director.
  8. Invoices for Agency accounts that have agreements with UTSA to reimburse for university provided goods/services and invoice non-campus entities involved in joint-sponsored events held on campus.

<p>9. Responsible for testing, review and release of student 1098T tax forms. Answers student/parent questions about process.</p> <p>10. Coordinates student holds and notifications to customers who present check payments that are returned unpaid.</p> <p>11. Conducts monthly reconciliations of various accounts including Maintenance &amp; Operations, Payroll, Agency and university-wide clearing accounts.</p> <p>• <u>Periodic:</u></p> <ol style="list-style-type: none"> <li>1. Attends meetings and serves on committees.</li> <li>2. Performs other duties as assigned.</li> </ol>
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***Education***

<b>Required</b>	<b>Preferred</b>
Associate’s degree from an accredited institution.	Bachelor’s degree from an accredited institution.

***Other Requirements***

<b>Required</b>	<b>Preferred</b>
N/A	N/A

***Experience***

<b>Required</b>	<b>Preferred</b>
Four years of increasingly responsible administrative, clerical, or office experience to include one year of customer service experience.	Knowledge of current methods and systems of bookkeeping, filing, and purchasing.
	Demonstrated ability to apply knowledge in everyday work situations while utilizing independent judgment.
	Advanced knowledge of university organizational structure, polices, rules, and procedures.

***Equipment***

<b>Required</b>	<b>Preferred</b>
Personal computer, Microsoft Office Suite (to include Word, Excel, and Outlook), and standard office equipment.	N/A

***Working Conditions***

<b>Usual</b>	<b>Special</b>
Normal office conditions.	Occasional evening and weekend hours.

***Supervision***

<b>Received</b>	<b>Given</b>
Direct supervision and direction from the Director of Financial Services and University Bursar.	Assigned clerical staff.

***Accuracy***

Proficiency in all phases of the duties performed.

***Security Sensitive***

Specific job requirements or physical location of some positions allocated to this classification may render the position security sensitive, and thereby subject to the provisions of section 51.215 Texas Education Code.

***Internal Control***

Within the scope of position duties, responsible for seeing that operations are effective and efficient, assets are safeguarded, reliable financial data is maintained, and applicable laws, regulations, policies, and procedures are complied with.