

Post Details		Last Updated: 05/10/11	
Faculty/Administrative/Service Department:	Financial Transaction Services – Student Finance		
Job Title:	Student Finance Advisor		
Job Family & Job Level	Professional Services	Level 3	
Responsible to:	Student Finance – Team Leader		
Responsible for:	n/a		
<u>Job Purpose Statement</u>			
<p>Responsible for raising tuition fee and accommodation invoices and for the review and collection of all debts owed to the University by students. This team owns Student Finance processes and IT systems sub ledgers (Agresso and SITS). The post holder provides guidance and support on a 1:1 basis to those students unable to pay amounts due at the required time. The post holder provides guidance to all University faculties and departments in the resolution of issues which arise as a result of student debt. Through the provision of this service, the post holder contributes to ensuring debts owed to the University are at a minimum thereby protecting cashflow and mitigating the cost of bad debt.</p> <p>This team is one of three within Financial Transactions Services, providing a Shared Service for coordination of financial transactional processes covering both Purchase to Pay and Order to Cash.</p>			
<u>Problem Solving, Accountability and Dimensions of the role</u>			
<p>The post holder:</p> <ul style="list-style-type: none"> • Will operate with minimal supervision in the day-to-day planning, organising and performance (to an agreed quality standard and specification) of a range of activities related to management and collection of student debt. It is important that the post holder demonstrates initiative in the arrangement of their immediate work priorities, including successfully managing any conflicting demands, possessing an awareness of the options available and being able to make effective and appropriate decisions in order to meet agreed deadlines and ensure events are dealt with promptly. This is particularly important when dealing with student debt as failure to do so has an impact on University debt profile and potentially the students' eligibility to continue to study at the University. • Must be a confident communicator as they are required to liaise with University students (undergraduate and postgraduate), colleagues, collection agents, solicitors and other external stakeholders in order to ensure that all fees due are collected in a timely manner and within agreed terms. They must have the ability to assess the validity and accuracy of the debtor record from a variety of sources, including University systems and paper records held by Registry, Accommodation or Faculties. The post holder may be required to attend meetings with colleagues, providing guidance and advice on processes relating to student finance as appropriate and to support the unit activities. • Will be required to have a good understanding of academic issues as they relate to fee liability; student funding and support; finance as it relates to students and a general understanding of the Higher Education sector. • Will provide advice and solutions to routine day-to-day problems and to act as a filter for issues/problems referred to the Team Leader where questions or issues arise which fall outside of the remit of their roles. Resolution for most issues will be found through referring to their previous experience of similar problems or through making reference to departmental policies and procedures. The post holder is therefore, required to have a detailed understanding of the methods, systems and procedures operated within the entire Student Finance function. Although the role is covered by standard instructions and procedures/regulations, there may on occasion be some latitude to alter the sequence of procedures, based on varying situations encountered. When faced with more complex issues, they are required to identify the nature of the problem or issue through analysis and to apply their judgement and initiative in order to find an appropriate resolution. When dealing with particularly unusual or complex problems, they are expected to first investigate a suitable resolution by referring to appropriate guidelines, legislation or procedure and to then forward recommendations on managing the situation/problem to the Team Leader, with only the most complex of problems being referred to them for resolution. The post holder is required to maintain accurate records relating to cases that they are assigned. 			

- Is required to contribute to proposing and implementing improvements or developments to current working practices in consultation with their manager, in order to ensure the smooth running of the service they provide.

Background Information/Relationships

- The post holder will have extensive contact with students and members of the University community.
- He/she will need to establish strong working relationships with :
 - Academic Administration
 - Student Care Services
 - Accommodation Office
 - Exams Office
 - International Office,

This job purpose reflects the core activities of the post. As the Department/Faculty and the post-holder develop, there will inevitably be some changes to the duties for which the post is responsible, and possibly to the emphasis of the post itself. The University expects that the post-holder will recognise this and will adopt a flexible approach to work. This could include undertaking relevant training where necessary. Should significant changes to the job purpose become necessary, the post-holder will be consulted and the changes reflected in a revised job purpose.

Person Specification This section describes the sum total of knowledge, experience & competence required by the post holder that is necessary for standard acceptable performance in carrying out this role.

Qualifications and Professional Memberships	Essential/Desirable	
HNC, A Level, NVQ 3, HND level or equivalent, with several years relevant work experience OR Relevant vocational experience, acquired through a combination of job-related training and considerable experience, demonstrating development through involvement in a series of progressively more demanding relevant work/roles	E	
Qualified ICM or AAT or studying towards qualification.	D	
Technical Competencies (Experience and Knowledge) This section contains the level of competency required to carry out the role (please refer to the competency framework for clarification where needed and the Job Families Booklet).	Essential/Desirable	Level 1-3
Broad customer relations experience	E	2
Microsoft Office experience	E	2
Finance Systems	D	n/a
Knowledge of relevant legislation, specifically those relating to money laundering and data protection.	D	n/a
Core Competencies This section contains the level of competency required to carry out this role. (Please refer to the competency framework for clarification where needed). N/A (not applicable) should be placed, where the competency is not a requirement of the grade.	Level 1-3	
Communication	3	
Adaptability / Flexibility	2	
Customer/Client service and support	2	
Planning and Organising	2	
Teamwork	1	
Continuous Improvement	2	
Problem Solving and Decision Making Skills	2	
Leadership / Management	n/a	

Creative and Analytical Thinking	1
Influencing, Persuasion and Negotiation Skills	1
Strategic Thinking	n/a

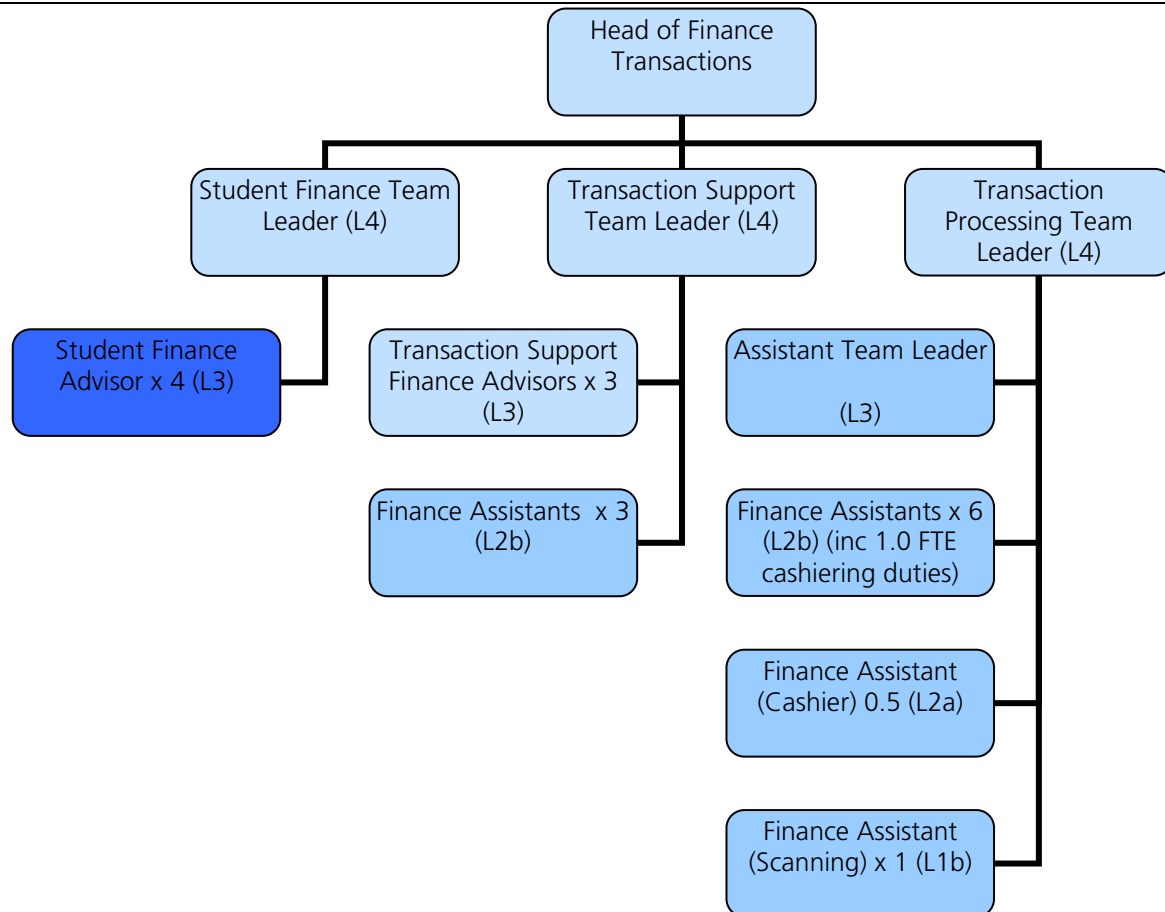
Organisational Information

All staff are expected to:

Positively support equality of opportunity and equity of treatment to colleagues and students in accordance with the University of Surrey Equal Opportunities Policy.

Help maintain a safe working environment by:

- Attending training in Health and Safety requirements as necessary, both on appointment and as changes in duties and techniques demand.
- Following local codes of safe working practices and the University of Surrey Health and Safety Policy.
- Excellent environmental performance is a strategic objective for the University of Surrey. All staff are encouraged to work to achieve the aims of our Environmental Policy and promote awareness to colleagues and students.
- Undertake such other duties within the scope of the post as may be requested by your Manager.



Key Responsibilities

This document is not designed to be a list of all tasks undertaken but an outline record of the main responsibilities (5 to 8 maximum) and should be read in conjunction with the accompanying Job Purpose.

1. To collect debts owed to the University, specifically by students who may owe tuition, accommodation or other fees. Students may be current, or may have been formally excluded.
2. To liaise with faculties ensuring all information held is relevant, factual and up to date and that any queries arising which may affect the fee liability are dealt with in a timely manner.
3. To contact students by telephone, non standard letter and face to face interviews following a thorough review of the student record.
4. To make payment arrangements with debtors, advise the consequences of non payment and refer the file to the Team Leader for implementation of sanctions or further action as necessary
5. To update the database with details of all contact and activity on a debtor file, to maintain a viable means of onward review of all cases assigned.
6. To hold regular progress meetings with the line manager.
7. To raise and issue tuition fee and accommodation invoices as required.

N.B. The above list is not exhaustive.

