



JOB DESCRIPTION:	Financial Services Representative II		
DEPARTMENT:	Business Office		
REPORT TO:	Executive Director/Director of Fiscal Affairs		
EEO CLASSIFICATION:	Professional	FLSA STATUS:	Exempt
CUPA HR CLASSIFICATION:	#430160	DATE APPROVED:	11-FEB-2022
		DATE MODIFIED:	11-JUN-2025

SUMMARY: Assists the Financial Services Manager in the billing and collection of accounts receivable and other related activities.

DUTIES:

1. Processes activities related to student accounts. Contacts students, authorized users, faculty, staff, and outside agencies by all means including in-person, telephone and online. Prepares and distributes fees and billing on a regular scheduled basis at all levels. Oversees functions of cashiers and student workers.
2. Processes student refunds, verifying accuracy and working in conjunction with Student Financial Aid and Registrar offices.
3. Assists in maintenance and revisions to all correspondence for the Business Office in regard to student accounts and accounts receivable. Assists in maintenance of and revision to various Business Office website pages as directed. Performs miscellaneous tasks using third party software as directed and assists students and authorized users in navigation.
4. Assists in processing and monitoring accounts for collection. Prepares accurate and concise invoices to various federal, state, local and private agencies on behalf of students. Reconciles subsidiary accounts receivable ledger to the general ledger on a weekly basis and performs a monthly review of reconciliation of all third-party accounts.
5. Assists in planning and coordination of Business Office activities regarding all student registration events to include, but not limited to, third party orientations and first year orientations.
6. Coordinates and assists in training programs for the Business Office for both staff/faculty as well as students.
7. Oversees maintenance of card service functions within the Business Office. Works closely with IT staff in coordination of new term set up, reporting and equipment upkeep. Provides training and card service equipment logs for both internal departments as well as outside agencies.
8. Responsible for the Project +1 for the department under the directive of the Business Office and Professional Development.
9. Performs other duties as assigned.

REQUIREMENTS:

1. **Education /Background:** Bachelor's degree in Accounting/Business or related field, or Associates degree plus 4 years of related experience, or High School Diploma or GED 6 years of related experience. Bilingual (Spanish) preferred.
2. **Job Knowledge:** Must have solid demonstrated knowledge of accounting transactions, practices and procedures as well as related federal, state and local laws and regulations. Must be knowledgeable of University policies, procedures and regulations regarding accounting functions. Must be able to handle multiple deadlines and maintain accuracy. Must be sensitive to cultural

differences within the University and community. Fluent in Microsoft Office Applications, accounting and banking techniques and systems. Knowledge of customer service principles, practices and techniques. Knowledge in Banner systems preferred.

3. **Working Conditions/Physical Demands** (With or Without Accommodations): Normal office environment, may travel some within the community when needed. May be required to transport normal office equipment and materials. Ability to comprehend and work with a variety of information from various sources. Able to clearly communicate with a diverse population of individuals. Ability to compose correspondence and reports and remain in a sedentary position for prolonged periods of time. May be required to work additional hours or days depending on circumstances.
4. **Other requirements:**

This job description is not an exhaustive list of all responsibilities, skills, duties, requirements, effort, and/or working conditions associated with the position. Management reserves the right to revise the job or to require that other or different tasks be performed when circumstances change. In addition, this job description is not intended to create a contract of employment between the employee and Western New Mexico University, nor shall it be regarded as a promise to provide specific terms or conditions of employment.

I have read, understand and accept a copy of this job description.

Employee Signature

Date

Employee Name (Printed)