

Position Description

Read each heading carefully before proceeding. Make statements simple, brief, and complete. Be certain the form is signed. Supervisors and incumbents are responsible for the completion of this form.

CHECK ONE: NEW POSITION EXISTING POSITION
(allocated)

PART I - Position Information. Items 1 through 12 to be completed by department

1. Agency Name: Kansas State University
9. Position Number: W0005993
10. Department ID: 3670005040

2. Employee Name (leave blank if position vacant): Lisa Lieberman
11. Present Class Title (if existing position): Accounting Specialist

3. Division: Vice President for Administration & Finance
12. Proposed Class Title: N/A

4. Section: Controller's Office

5. Unit: Student Services- Loans

6. Location (address where employee works):
City: Manhattan County: Riley

7. Type of Appointment (Circle):
Full Time Part-Time 100%

School Employee

Limited Term ending date (if applicable):

8. Regular hours of work: (enter appropriate time)
FROM: 8 AM TO: 5 PM

H	13. Allocation	<i>Accounting Specialist</i>
U	Supervisory Status:	yes <input checked="" type="radio"/> no <input type="radio"/>
M	FLSA CODE:	<input checked="" type="radio"/> nonexempt <input type="radio"/> exempt
A		
N		
R	14. Effective Date:	<i>2/18/10</i>
E	15. By:	<i>[Signature]</i>
S	Approved:	<i>[Signature]</i>
O	16. Audit(s)	
U	Date:	By:
R	Date:	By:
C	17. Position Review(s)	
E	Date:	Date:
S	Date:	Date:

PART II - Organizational Information. To be completed by department head or supervisor of the position.

18. a) Briefly describe why this position exists. (Include how the position relates to the purpose, goal, or mission of the unit.)

This position functions as the primary liaison between contracted student loan billing services and borrowers of Perkins, Health Profession, and Foundation Student Loans.

b) If this is a request to reclassify a position, briefly describe the reorganization, reassignment of work, new function added by law or other factors which changed the duties and responsibilities of the position.

N/A

19. Who is the supervisor of the incumbent in this position? (Who assigns work, gives directions, answers questions and evaluates.)

Name: Mary Sutton Title: Accountant III Position Number: W0006008

List other individuals who may provide input for evaluation purposes.

Name: James G. Badders Title: Assistant Controller Position Number: W0041492

20. a) How much latitude is employee allowed in completing the work? b) What kinds of instructions, methods and guidelines are given to the employee in this position to help do the work? c) State how and in what detail assignments are made.

This position has a moderate amount of independent judgment in implementing the work of this position. Work involves a variety of tasks that require the ability to prioritize and organize the workload. This position follows office policies and procedures to perform required duties. Written procedures and guidelines are provided for routine tasks and oral instruction from the supervisor is provided as needed. Tasks are completed on a daily basis as the need arises in order to get them completed by scheduled deadlines.

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2f. Describe the work of this position using this page and/or one additional page only. (Please use the following format to create task statements for actual job duties:)

What is the action being done (use an action verb); to whom or what is the action directed (object of action); why is the action being done (describe the result or outcome expected); *how is the action expected to be performed (describe the manner, methods, techniques or procedures in which the task is currently performed). For each task, state: Who reviews it? How often? What is it reviewed for?

Number each task and indicate percent of time and identify each function as essential or marginal by placing an E or M next to the % of time for each task. Essential functions are the primary job duties for which the position was created and that an employee must be able to perform, with or without reasonable accommodation. A marginal function is a peripheral, incidental or minimal part of the position or one that can be performed with assistance or by another individual. **OFFICIAL DETERMINATIONS ARE MADE BY CLASSIFICATION SERVICES.**

*The description of how the work is to be performed does not preclude the consideration of reasonable accommodation(s) for qualified persons with a disability.

No. % E or M

1. 55% E Function as the primary liaison between contracted student loan billing services and borrowers of Perkins, Health Profession, and Foundation Student Loans. Duties include accessing the billing service's computer system to obtain information regarding borrowers. Weekly, upload all new loans as well as advances and reductions to existing loans to the billing service. Monthly, download customer summaries from the billing service and prepare the file for the Accountant III (W0006008) to reconcile any differences between SFA and the billing service. From data received from the billing service input deposit information electronically using CASHNet system. Forward validated deposit slips to the Accountant III (W0006008) for posting. Review student loan hardship deferment requests and either approve or deny based on data submitted by the borrower and criteria set under federal regulations. Complete Department of Defense (DOD) loans repayment request forms, compute collection costs when appropriate and respond to inquiries from borrowers about their accounts. Provide information to loan billing server regarding dates, amounts or other information requested and contact borrowers when necessary. Monitor payment transactions received from students, collection agencies, and setoff to assure that each payment is applied accurately to principal, interest, and late fees, and notifies billing service of necessary adjustments. Review monthly reports from our billing service and take appropriate action. Work with the Accountant III (W0006008) to keep the cohort default rate down by sending letters, deferment forms and telephoning borrowers if necessary to get their account out of default status. Process bankruptcies that relate to the various loan funds. Refund overpayments to the borrower or consolidation company, which ever overpaid the Perkins, Health Professional, or Foundation Student Loan Balance. The Accountant III (W0006008) reviews work by the results obtained.
2. 15% E Post data received from the ESL Cashier to a spreadsheet to provide the Accountant III with transaction details necessary to reconcile the ESL system to FIS.
3. 15% E Utilizing data received from the loan servicer, post daily HPSL entries to the monthly journal. Verify that all cash and non-cash transactions are posted the same in the journal, FIS, and the loan servicer. Work is reviewed by the Accountant III (W0006008) for accuracy.
4. 15% E Other duties to include, but not limited to assisting students with the exit interview process. Assist the Accountant III (W0006008) in assigning Perkins accounts to the federal government for collection. This involves following specific regulations in compiling all necessary paperwork (Promissory Notes, repayment schedules, collection agency information, etc.) and submitting to the Department of Education. The Accountant III (W0006008) reviews the work for accuracy and conformance to procedures.

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22. a) If work involves leadership, supervisory, or management responsibilities, check the statement which best describes the position.

- Lead worker: Assigns, trains, schedules or oversees work of others.
- Supervisor: Plans, staffs, evaluates, and directs work of employees of a work unit.
- Manager: Delegates authority to carry out work of a unit to subordinate supervisors or managers.

b) List the class titles, and position numbers of all persons who are directly supervised and evaluated by employee in this position.

Title	Position Number
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N/A

23. Which statement best describes the results of error in action or decision of this employee?

- Minimal property damage, minor injury, minor disruption of the flow of work.
- Moderate loss of time, injury, damage, or adverse impact on health and welfare of others.
- Major program failure, major property loss, or serious injury or incapacitation.
- Loss of life, disruption of operations of a major agency.

Please give examples and describe consequences of action.

Possible loss of additional federal funds if regulations are not followed properly.

Loss of goodwill between the university and debtors if actions taken are not appropriate and if delinquent amounts are not correct.

If payments are not posted in a timely manner, students may be charged late fees unnecessarily.

24. For what purpose, with whom and how frequently are contacts made with the public, other employees or officials.

Daily contact with borrowers either at the request of the billing service or by way of direct phone calls.

Daily contact with our billing service's customer representative to ask or answer questions regarding borrower's accounts

Daily contact with other Controller's Office personnel regarding various actions (depositing funds, etc.)

25. a) What hazards, risks, or discomforts exist on the job or in the work environment?

Extensive daily use of personal computer required.
Occasional dealings with irate borrowers.

b) Describe any methods, techniques, procedures or equipment that must be used to ensure safety for equipment, employees, clients and others.

Use of an ergonomic keyboard available.

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26. List machines or equipment used regularly in the work of this position. Indicate the frequency with which each is used.

Daily use of personal computer, adding machine, copier, fax machine and telephone.

PART III - Education, Experience and Physical Requirements Information.

27. **MINIMUM REQUIREMENTS** as stated in the State of Kansas Class Specification. (Job skills beyond state specifications should be entered in #29)

One year experience in accounting/auditing support work. Education may be substituted for experience as determined relevant by the agency.

28. **NECESSARY SPECIAL REQUIREMENTS**

a) List any licenses, registrations or certifications for this position that are required to perform the essential functions of the position.

N/A

b) Describe the physical requirements of the job as they relate to essential functions (focus on results, not methods of obtaining results).

Work requires repetitive movements in entering and generating data by manipulating electronic equipment.

29. **PREFERRED QUALIFICATIONS AND SKILLS**

a) List preferred education or experience that may be used to screen applicants.

At least one year experience in post high school bookkeeping or accounting.

b) List preferred special knowledge, skills and abilities.

MS Word, Excel, Access, e-mail, and data entry.

Ability to understand, explain, and apply regulations and work with student borrowers.

Proficiency in complex mathematical calculations.

Ability to communicate effectively both orally and in writing.

30. **BONA FIDE OCCUPATIONAL QUALIFICATION (BFOQ)**

State additional qualifications for this position that are necessary as a bona fide occupational qualification (BFOQ).

N/A

PART IV - Organizational Chart (Please attach). Indicate classification title and position number.

Attached.

PART V - Signatures

