**Financial Practitioner II Standard Job Description**

**Classification Title:** Financial Practitioner II

**FLSA Exemption Status:**Non-Exempt

**Pay Grade: 9**

**Job Description Summary:**

The Financial Practitioner II, under general supervision, provides complex clerical, accounting, financial and customer service duties.

**Essential Duties/Tasks:**

**40% Sponsor Billing and Accounts Management**

* Maintains all international sponsor functions, including applying and managing contracts to student accounts, auditing contracts to ensure correct application of payment to student accounts, invoicing, maintaining refund suppresses, and auditing accounts to ensure correct refunds to either the student or the sponsor.
* Executes special handling of international sponsor invoicing, including requesting special billing templates, completing special requests from sponsors, and sending invoices via mail or Filex as needed.
* Manages the Flywire Sponsor billing portal, including setting up users, helping users navigate Flywire, troubleshooting when needed, invoicing all sponsors, and applying payments in Flywire.
* Coordinates customer service for sponsors, students, and departments regarding questions with the Flywire portal.
* Ensures website and communications related to sponsor billing are up to date.
* Develops internal procedures and ensures new administrators within SBS are fully trained on using Flywire.

**20% Financial Analysis and Reporting**

* Performs daily, weekly, monthly, quarterly, semesterly, and annual reporting checks for efficiencies and accuracy, including auditing the Refund Suppress report from the Refund team, and invoicing reports associated with Flywire.
* Monitors and checks accounts receivables report, Banner system screens, and Flywire portal to ensure timely payment and payment processing.
* Coordinates past due reconciliation efforts, contacting sponsors to identify payment status, and sending invoices when necessary.
* Audits and analyzes financial records for compliance with established standards and rules regarding the posting of international and TWC State funds to student accounts.

**10% Supervision and Staff Training**

* Supervises customer service student employees, including hiring, terminating, scheduling, evaluating, and guiding work.
* Reviews weekly work progress for each student employee by running reports of customer service instances.
* Answers questions from student employees on items that need assistance.
* Develops and delivers training on daily operational activities for student employees, especially when key changes occur, ensuring alignment with answers provided to students and parents.
* Creates training materials such as slide show presentations, job aids, and procedures, particularly when implementing new software or processes.
* Holds group and one-on-one training sessions for student workers and full-time employees.

**10% Customer Service and Issue Resolution**

* Responds to escalated customer service inquiries via email or phone after conducting detailed research on the situations.
* Reviews all incoming customer service requests to ensure accurate and timely responses.
* Assists with delinquent institutional loans by sending monthly text messages and making calls to students at risk of having their loans sent to a collection agency.
* Performs advanced research to find discrepancies and reports results for customer service issues.

**20% Duty Title (for the department's use)**

* Remaining Percentage Can Be Determined by Department to Meet Business Needs or Can Be Incorporated into Percentages Above.

**Qualifications:**

**Required Education:**

* High school graduation or any equivalent combination of education and experience.

**Required Experience:**

* Eight years of experience in a specialized financial field such as accounts payable, payroll or student accounts.

**Required Licenses and Certifications:**

* None

**Required Knowledge, Skills, and Abilities:**

* Ability to multitask and work cooperatively with others.
* Knowledge of word processing and spreadsheet software.
* Oral and written communication skills.

**Additional Information:**

**Machines and Equipment:**

* Computer
* Telephone

**Physical Requirements:**

* None

**Other Requirements and Factors:**

* This position is security sensitive
* This position requires compliance with state and federal laws/codes and Texas A&M University System/TAMU policies, regulations, rules and procedures
* All tasks and job responsibilities must be performed safely without injury to self or others in compliance with System and University safety requirements

**Is this role ORP Eligible? If so, it needs to meet the criteria on the** [**Rules and Regulations of the Texas Higher Education Coordinating Board**](https://reportcenter.highered.texas.gov/reports/data/user-friendly-version-of-ch-25/)**.**

[ ]  **Yes**

[x]  **No**

**Does this classification have the ability to work from an alternative work location?**

[ ]  **Yes**

[x]  **No**