

Job Code:..... 100669  
Position#: (PSA)..... (E)  
Developed by:.....TEP  
Reviewed by:.....LK; DLJ  
Approved by:.....LK  
Date:.....6/6/2023

**UNIVERSITY OF RHODE ISLAND**  
**Position Description**

**TITLE:** Manager, Student Financial Reporting and Analysis  
**DIVISION:** Administration and Finance (Controller)  
**REPORTS TO:** Associate Controller, Financial Reporting  
**GRADE:** 13  
**SUPERVISES:** Loan office support staff

**BASIC FUNCTION:**

Responsible for the management of all aspects of loan office operations including transaction accounting (loan notes, deferments, cancellations, payments, etc.), collection and counseling functions associated with delinquent accounts and compliance with fiscal and reporting requirements associated with federal aid programs. Responsible for the reconciliation and reporting of student-related revenue and student receivables. Responsible for auxiliary and enterprise financial reporting.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

Develop and implement, substantially independently, policies and procedures relating to the various aspects of the Student Loan Office operations. Primarily, such policies and procedures must be consistent with various federal fiscal requirements and involve the National Defense, National Direct, NIH, Nursing, NIH Health Professions and URI Short-term Loan programs.

Manage Loan Office systems development and enhancements. Such management includes input/output coordination as well as interface with various other University systems, such as, the Financial Record System and the Student Record System.

Manage the periodic billing processes involving all loan accounts including the coordination of deferments and cancellations, as provided by federal regulations, for the NDSL, NDL, Nursing and Health Professions program.

Manage and conduct delinquent account collection activities primarily involving direct contact with debtors concerning repayment obligations and alternatives.

Supervise skip-tracing functions.

Provide physical and electronic maintenance and security for promissory notes and loan documentation consistent with federal regulations.

Manage preparation of required federal and University operational reports including collections, default, and delinquency data.

Reconcile and review student accounts receivable and related tuition and fee revenue to student financial subledger.

Reconcile Allowance for Uncollectible Accounts/Bad Debt Expense and review adequacy of the Allowance as it relates to student tuition and fees and loan balances.

Reconcile and review student aid, institutional loan, and federal direct loan funds.

Calculate Student Allowance.

Perform accounting and reporting of auxiliary and enterprise funds including preparation of annual internal financial statements.

Perform other ad hoc reporting as necessary.

**OTHER DUTIES AND RESPONSIBILITIES:**

Maintain liaison with appropriate funding agency offices including US Office of Education and Department of Health and Human Services, with the URI Office of Enrollment Services, including the Financial Aid Office, collection agencies, and counterparts at other institutions of higher education.

Provide staff supervision, training, and guidance concerning loan systems utilization, operation, and information.

Advise Controller, Associate Controller, and/or Assistant Controller concerning federal loan program regulations and ramifications pertaining to the University.

Perform additional duties as assigned.

**LICENSES, TOOLS, AND EQUIPMENT:**

Personal computers, printers and word processing, data base management and spreadsheet software. Excel.

**ENVIRONMENTAL CONDITIONS:**

The incumbent is not substantially exposed to adverse environmental conditions.

**QUALIFICATIONS:**

**REQUIRED:** Bachelor's or Master's degree in accounting, finance or other business-related field; Minimum of seven years of professional accounting experience; Minimum of five years of supervisory experience in financial administration (preferably in finance or loan management); Demonstrated experience working with a complex financial software system; Demonstrated experience working with Microsoft Excel; Demonstrated strong interpersonal and verbal communication skills; Demonstrated proficiency in written communications skills; Demonstrated ability to interpret and communicate institutional, federal and state policies, plans, objectives, rules and regulations; Demonstrated ability to be a team player; and, Demonstrated ability to work with diverse groups/populations.

**PREFERRED:** Master's degree in Accounting or business-related field, and/or CPA; Demonstrated experience in a large, complex accounting department and/or higher education environment; and, Demonstrated experience with Peoplesoft Financial Systems.

**ALL REQUIREMENTS ARE SUBJECT TO POSSIBLE MODIFICATION TO REASONABLY ACCOMMODATE INDIVIDUALS WITH DISABILITIES.**