

# The University of Texas at San Antonio

## *Job Description*

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Job Title: Financial Services Associate I  
Code: 19191  
Salary Grade: 55  
FLSA Status: Non-Exempt  
Department/Division: Financial Services and University Bursar  
Reports To: Director of Financial Services and University Bursar

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## *Summary*

- **Function:** Serve as a front line customer service position in Financial Services, providing guidance and explaining policy and options available for our student customers.
- **Scope:** Uses initiative and independent judgment to relieve one or more administrators of administrative matters and decisions. Assists administrators in establishing and attaining departmental goals and objectives.

## *Duties*

- **Typical:**
  1. Counsels/advises students, both on the phone and in person, on financial and related student service issues.
  2. Assists students and parents with questions regarding fiscal questions. Directs them to the correct departments.
  3. Runs daily bank reports for the department.
  4. Coordinates comment cards for the department to determine customer service levels that are provided.
  5. Acts as a liaison with other departments and agencies regarding inventory control, building services, equipment maintenance and repair, purchasing, safety and other administrative matters.
- **Periodic:**
  1. Attends meetings; serves on committees.
  2. Performs other duties as assigned.

### *Education*

<b>Required</b>	<b>Preferred</b>
Associate's degree from an accredited institution.	Bachelor's degree from an accredited institution.

### *Other Requirements*

<b>Required</b>	<b>Preferred</b>
N/A	N/A

### *Experience*

<b>Required</b>	<b>Preferred</b>
Two years of increasingly responsible administrative, clerical, or office experience to include one year of customer service experience.	Knowledge of current methods and systems of bookkeeping, filing, and purchasing.
	Demonstrated ability to apply knowledge in everyday work situations while utilizing independent judgments.
	Advanced knowledge of university organizational structure, policies, rules, and procedures.

### *Equipment*

<b>Required</b>	<b>Preferred</b>
Personal computer, Microsoft Office Suite (to include Word, Excel, and Outlook), and standard office equipment.	N/A

### *Working Conditions*

<b>Usual</b>	<b>Special</b>
Normal office conditions.	Occasional evening and weekend hours.

### *Supervision*

<b>Received</b>	<b>Given</b>
Direct supervision and direction from the Director of Financial Services and University Bursar.	Assigned clerical staff.

### *Accuracy*

Proficiency in all phases of the duties performed.
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***Security Sensitive***

Specific job requirements or physical location of some positions allocated to this classification may render the position security sensitive, and thereby subject to the provisions of section 51.215 Texas Education Code.

***Internal Control***

Within the scope of position duties, responsible for seeing that operations are effective and efficient, assets are safeguarded, reliable financial data is maintained, and applicable laws, regulations, policies, and procedures are complied with.