



**YOUNGSTOWN
STATE
UNIVERSITY**

CLASSIFICATION SERIES:

Accountant-Examiner Occupation

BARGAINING UNIT:

ACE

Accountant Senior Examiner

SERIES PURPOSE: The purpose of the Accountant Examiner occupation is to review various transactions for given accounts, external audits, and/or program information to determine accuracy, completeness, compliance and/or the need for further processing relative to billings, federal or third-party reimbursements, collection of fees or payments, payment of claims, or bills and/or invoices.

CLASS CONCEPT: The class works under general supervision with a low level of intervention on the part of the supervisor and requires extensive knowledge of accounting and federal and/or state guidelines applicable to documents reviewed in order to process reimbursements for students or from service providers, or reviews and processes all billing to include addressing complaints from general public or makes changes and corrections to authorizations prior to billings being paid, or receives and responds to telephone and/or other inquiries concerning delinquent premium balances; communicates with appropriate department and/or agency for further collection efforts. Examines credit balance ledgers to include appropriate action necessary to include refunds, bad debt reversals, and/or account adjustments. Assignments will include providing input into the development of billing work processes and training staff members. Acts as lead worker over lower-level staff personnel.

JOB DUTIES: Incumbents may perform some or all of these duties or other job-related duties as assigned.

Prepares, updates, and maintains the Bursar office production calendar for student and non-student billing which determines when processes and billing are completed. Prepares spreadsheet given to IT to enter dates in the scheduling system where various Bursar jobs are ran automatically at scheduled times.

Prepares and calculates the institution's schedule for the return of unearned tuition assistance funds to the government on the Department of Defense (DOD) web site.

Reviews various auditing reports for the proper billing and posting of transactions to student accounts. Assigns some of the auditing reports to Accountant Examiner staff to review for accuracy and posting issues. Reviews and calculates Title IV summer book money refunds and delegates to other office staff to post the refunds on the students' account.

Prepares invoices and reconciles tuition assistance programs that are administered by the Office of Financial Aid & Scholarships. Monitors payments received and follows up on payments not sufficient enough to cover tuition assistance billing.

Uses independent and guided judgement concerning processes, financial responsibilities, account status and account recovery procedures; exercises independent judgment in resolving problems; accesses information from a variety of sources to determine appropriate action.

Coordinates and/or performs a variety of fiscal and/or business activities and support functions; maintains ledgers; clarifies and handles billing and/or payment discrepancies; including cashier duties and maintaining accurate transaction records.

Reviews payments received to ensure correct amount is applied to student accounts; reconciles reports; manually applies prior term receivable debits to accounts.

Analyzes and processes accounts and financial documents according to general guidelines and procedures; verifies accuracy and validity of accounting documents; determines appropriate actions based on review of information and application of general guidelines.

Works with Office of Veterans Affairs to ensure correct payment is applied; performs monthly reconciliation of any outstanding payments; submits a final report to the Controller's Office for reconciliation with the University's checking account. Works with other university constituents as needed.

Responds to inquiries from internal and external constituents concerning department or student accounts; provides general information to authorized parties; explains University and departmental policies and procedures.

Prepares and compiles material for financial and/or statistical reports; generates statistics. Prepares documents and/or enters financial data into spreadsheet; revises data as necessary.

Analyzes and revises complex student accounts receivables, etc. Explains complicated account activity to students/parents, counseling them on options available. Works in conjunction with, provides, and coordinates a wide variety of account information to other university departments.

Identifies students who are potential financial suspension and Ohio Board of Regents candidates, monitors these accounts for activity, including payments or potential for payment. Counsels students and/or their parents as to the necessary steps to avoid financial suspension and the consequences of a financial suspension.

Prepares and processes non-routine debit/credit memos, student refund checks, and financial aid refunds.

Assists in the preparation and/or processing of current and past due account statements, incoming/returned mail, replacement of lost/stolen/never received mailings. Generates monthly billings for students, non-student billing, and third-party billing for tuition assistance programs. Assists department in the processing of incoming/returned billings and billing inquiries, data entry report preparation, audits, file maintenance, and other related duties as assigned. Assists in coordination of billing to minimize outstanding receivables.

Effective 10/29/2025

Assists in resolution of miscellaneous account problems, completion of special projects, report audits, and preparation and file maintenance.

Prepares reports and performs fiscal analysis to effect payment of services. Reviews/approves billing requests, contracts, documentation, and rational behind request to ensure that standard accounting procedures are followed. Audits receivables and advises appropriate action regarding reversals, adjustments, and collections.

Inputs and updates data and generates monthly billings. Reviews accounts for payments, accuracy, and adjustment in premium charges.

Examines account receivable documents, aging reports and other special reports, and establishes rational behind the reports to ensure standard accounting practices are followed.

Takes appropriate action to generate refunds and creates Check Request as necessary.

Monitors College Credit Plus (CCP) and Youngstown Early College (YEC) accounts for enrollment status and action to take on specific accounts. Prepares CCP and YEC student accounts for exemption status.

Applies calculated write-off charges to individual non-student and/or student accounts.

Advises students and parents on the federal guidelines pertaining to FERPA (Family Education Rights and Privacy Act), loans, and the impact of Title IV awards and re-calculation when a student adjusts hours or completely withdraws.

Meets the federal "due diligence" requirements for communication.

Prepares assignment forms and verification packets for turnover of delinquent accounts to the Ohio Attorney General's Office and the federal Department of Education.

Monitors third party account service provider for accuracy and compliance with federal guidelines and university policies.

Trains appropriate staff on regulations/compliance processes.

Analyzes month end reports, trial balance, and general ledger in order to balance and prepare all month end required reporting. Completes monthly balancing of transactions.

15% - Answers walk-in customer questions and complaints. Responds to Credit Bureau Disputes.

Communicates regularly with various collection agencies and credit bureaus to report and update payment status. Assists in the annual write-off of accounts.

Analyzes, prepares, and/or makes adjustments to educational expense and tax forms.

Assists other departmental staff with student and non-student accounts. Assists during peak periods and extended hours by answering routine telephone and in-person questions. Serves as back up for other departmental staff as needed and assigned.

Other Functions and Responsibilities: Assists with training new hires.

Performs any and all other duties assigned and/or required that are within the level of responsibility for this classification at the discretion of the supervisor.

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of: accounting; applicable state and/or federal regulations governing documents processed, reviewed, and/or prepared*; public relations*.

Skill in: use of a computer and all other standard office equipment, including a calculator and/or adding machine.

Ability to: apply principles to solve practical, everyday problems; gather, collate, and classify information about data, people, or things; complete routine forms and prepare standard reports and business correspondence; handle routine and sensitive inquiries from and contacts with other government officials, general public, claimants, and/or providers.

(*) Developed after employment.

Minimum Qualifications: At least a bachelor's degree in finance, accounting, or a related field; or three years of experience working in accounting, finance, or a related field.

Preferred Qualifications: Three or more years of experience in higher education.

PHYSICAL REQUIREMENTS: In accordance with the U.S. Department of Labor physical demands strength ratings, this position will perform sedentary work.

SEDENTARY: work involves exerting up to 10 pounds of force occasionally or a negligible amount of force frequently to lift, carry, push, pull, or otherwise move objects, including the human body. Sedentary work involves sitting most of the time but may involve walking or standing for brief periods of time. Jobs may be defined as Sedentary when walking and standing are required only occasionally, and all other Sedentary criteria are met.

UNUSUAL WORKING CONDITIONS: Not applicable