

Business Office Assistant

Summit's business office assistant is responsible for maintaining accurate and timely recording of all tuition and incidental billings and payments, as well as donor contributions. Additional business office tasks require attention to detail and strong organizational skills to contribute to the overall success of our business office.

Required experience and abilities:

- **Proven experience as an accounts receivable specialist or in a similar role**
- **Familiarity with Microsoft Office software applications and Google Workspace, as well as accounting software, such as QuickBooks**
- **Knowledge of billing and invoicing processing**
- **Strong mathematical aptitude and proficiency with financial calculations**
- **Ability to maintain confidentiality of sensitive personal information and financial calculations**
- **Strong problem-solving and decision making skills**

Business Office Assistant

Manage Accounts receivable activities and assist the Business Manager as requested.

School Tuition Billing

Responsible to process all student enrollments (re-enrollment, new enrollment, and EE program enrollment)

Complete the master checklist for each enrolling family
Generate a QuickBooks (QB) tuition invoice
Post tuition invoices to the FACTS Financial accounts
Add tuition information to Business Office Excel spreadsheet (used for verification and audits)

EE/NILD Tuition Billing

Responsible for processing completed DocuSign EE/NILD contracts.

Edit the master checklist for student enrolled in EE/NILD upon receipt of DocuSign contract

Generate a QB tuition invoice for this billing
Post charges to the FACTS Financial accounts
Update the shared Excel Business Office and EE/NILD spreadsheets

Tuition Assistance

Responsible for working with FACTS Grant & Aid to set up/review tuition assistance criteria for each school year and to process tuition assistance recommendations.

Review FACTS Grant & Aid tuition assistance recommendations
Calculate Summit's tuition assistance offer based on recommendation
Notify family of tuition assistance offer, Create a credit in QB, Post credit to FACTS Financial account
Update the master family checklist form
Update shared Excel Business Office spreadsheet (complete and tuition assistant tabs)

Billings other than tuition

Responsible to process billings for incidental billings

<p>Before & After Care (BAC)</p> <ul style="list-style-type: none"> ● Produce and update a monthly BAC student use chart based on Sign In / Sign Out sheets provided by the Grammar School ● At the start of a subsequent month, use the student BAC use chart to produce QB invoices for BAC monthly charges for each family with the due date of 15th of the subsequent month. (ie. April Use billings due May 15th). ● Print QB invoices and reports for FACTS input and verify accuracy. ● Post the monthly BAC invoices to the FACTS Financial family account via incidental billing accounts.
<p>Other FACTS Financial Incidental Billings, such as:</p> <ul style="list-style-type: none"> ● Athletic Fees <ul style="list-style-type: none"> ○ post SCA students' athletic fees via FACTS incidental billing from sport rosters provide by the Athletic Director ○ create the fall, winter, and spring sports FACTS Form and provide link to athletic director for non-SCA student for athletics registration and fee collection ● Field Trips – posted from notification from US Office Manager ● Lost Book Fees – posted from information from the front office admin assistant. ● Performing Arts Fees – posted from requests from Performing Arts teachers. ● Misc Fees – posted from submitted requests for billing

Remittances

Responsible for timely posting of tuition and other billings remittances.

Print semi-monthly FACTS Management Remittance Activity reports
Post the receipt of payments (tuition & other billings) in QB and print reports to verify accuracy posting accuracy
Review accounts for past due billings. Reach out to families with past due billing, sharing notification with the Business Manager

Donations

Responsible for recording donation receipts in FACTS Giving for each donor.

Post monthly in house donation receipts to FACTS Giving.
Produce monthly reconciliation FACTS Giving for online donations for Summit's business manager
Verify accuracy by confirming monthly posted balance to the monthly QB income statement
Produce a monthly summary report to share with pertinent stakeholder
Update Google docs for selected donation categories (ie. Capital Campaign, Global Missions)
Produce and send annual contribution statements to each donor by January 31 st .

Qualify families for Children's Tuition Fund (CTF) and assist donors in giving.

Aid contributors with effectuating a CTF donations
Identify families who may qualify for CTF and invite each to apply
Work with CTF of Virginia to ensure qualification of each family
Submit (and follow-up) disbursement requests for CTF funds
Complete and submit required documentation for the VA Dept of Education of standardized test results for each family who received a disbursement

HR Assistant

Assist the Head of School (HOS) to facilitate annual job performance appraisals for non-faculty personnel.

Update non-faculty job descriptions as requested by the HOS
Set up DocuSign for job performance appraisals to be sent adhering to schedule set by the HOS
Send out job description pdfs and DocuSign performance appraisals when scheduled
Save completed job performance appraisals in designated shared electronic folders

Share google doc SMART Goal documents for each, non-faculty job position.

Employee/Volunteer Background Checks

Process VA Social Services and FBI background checks
Input date of completed background check in FACTS staff record (upload to portfolio)
Maintain hard copy files of all employees and volunteers
Update google doc spreadsheet for volunteer background checks for Athletic Director

Other:

Post student volunteer hours

Email standardized test results

Confirm monthly catered lunch order dollar balance