



## JOB DESCRIPTION FORM

### Section 1 - Office Identification

Organisation: CPSU/CSA	Classification: Level 2	Effective Date of Document: 13 March 2025
		Office No: 00061
Division: CORPORATE SERVICES	Title: MEMBERSHIP ACCOUNTS ADMINISTRATOR	
Salaries Agreement/Award: 2023 CPSU/CSA STAFF AGREEMENT		

### Section 2 - Reporting Relationships

Title: BRANCH/GENERAL SECRETARY Classification: CLASS 2	Other Offices Reporting directly to this office. <ul style="list-style-type: none"><li>Strategic Human Resources Officer L5/6</li><li>Senior Accounts Officer – General L4</li><li>Building Administrator L4</li><li>Senior Finance and Payroll Officer L4</li><li>Senior Records Officer L3</li><li>Computer Systems Officer L3</li><li>Reception/Administration Assistant L2</li></ul>
↑ Responsible to	
Title: Coordinator Corporate Services Classification: Level 7	
↑ Responsible to	
This Office	

Offices under direct responsibility		
Title: None	Classification	Nos of FTE's Supervised and Controlled

### Section 3 - Key Responsibilities

Responsible for financial aspects and interactions with CPSU/CSA members including the arrears management system and collection of membership arrears. The role also has strong customer service emphasis in the areas of membership finance processes, liaising with members directly and all other internal departments.
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## Section 4 - Context and Scope

Effective Date of Document:  
13 March 20251

Title:  
Membership Accounts Administrator

Classification:  
Level 2

Office No:  
00061

The Community and Public Sector Union SPSF Group (WA Branch)/Civil Service Association of WA (Inc). (CPSU/CSA is the State Public Sector Union of WA).

### Our Vision

Our vision is a fair and just society built through the provision of quality public services.

### Our Mission

We are a union of workers organising to win better jobs, stronger communities, an inclusive fairer society and a sustainable future.

### Our Values

Union Values	Public Service Values	Our Team's Values
Collectivism Solidarity Compassion Professionalism Fairness Sustainability Social Justice Equity	Ethical Citizenship Collaboration Integrity Equality Inclusiveness Transparency Accountability Innovation	We will maintain a positive environment that promotes: <ul style="list-style-type: none"><li>• Constructive and effective communication throughout the organisation and with our partners and the community.</li><li>• Mutual respect for the diversity of opinions and beliefs.</li><li>• Participation, inclusivity and cooperation.</li><li>• Adherence to processes and deadlines.</li><li>• Recognition of performance.</li></ul>

### Our goals are:

- Goal A: Promote and advance the rights, job security and working conditions of our members.
- Goal B: Increase and diversify our membership base.
- Goal C: To grow a diverse and confident network of workplace leaders who represent and active members and participate in the democracy of our Union.
- Goal D: A diverse innovative high performance team with values that align with our union direction and its purpose.
- Goal E: To influence the progression of social justice issues that are consistent with our values.
- Goal F: Long term financial sustainability.

**Section 5 - Statement of Duties**

Effective Date of Document:

13 March 20251

Title:  
Membership Accounts AdministratorClassification:  
Level 2Office No:  
00061**MEMBERSHIP/DATA ENTRY**

- Provides advice to members on the financial status of their membership and maintains the financial status of Account/Invoice Payers and Direct Debit payers.
- Supports the maintenance of membership details, including salary rate changes, bank details changes, and payment method changes.
- Maintains the Member Accounts inbox and resolves all membership financial enquiries from internal and external correspondents.
- Responds to queries from members, including changes in bank details, suspensions, hardships, and the payment of outstanding arrears.
- Responds to potential members on various payment methods, including frequency, options, amounts and dates.
- Produces receipts and raises invoices for Account/Invoice Payers and Associate Members as required.
- Collects arrears in line with the current processes agreed to with the Growth team.
- Advises Growth Team of new members whose first payment was rejected.
- Provides support and information to other teams regarding the financial status of members, including historical information as required.
- Analyses payment reports to determine patterns of rejection reasons.
- Researches, analyses and resolves issues relating to arrears, contacting financial and unfinancial members where necessary.
- Responsible for collecting arrears starting from initial rejection by contacting members in line with current processes.
- Discusses the payment options with members, including negotiating and implementing payment plans.
- Produces and sends relevant arrears correspondence as required.
- Determines the financial status of members, particularly Delegates and Councillors, in line with CPSU/CSA internal election processes as requested.
- Advises members on refund procedures in line with CPSU/CSA rules.
- Provides refund calculations to UnionLink or Growth Team leads as requested.
- Negotiates refund requests directly with member's Payroll department as requested.
- Processes waived payments as advised by the Growth Team Lead, Coordinators, Branch/General Secretary and/or Branch/General Assistant Secretary.
- Reviews the details of members on waiver of dues (suspended status) in iMIS, establishing changes in member's circumstances and reactivating membership if appropriate.
- Reviews the details of members on the hardship rate in iMIS, establishing changes in member's circumstances and reverts membership rate as required.
- Manages existing and potential Associate members, including payments, establishing the Associate status of members, advising on member benefits, and producing invoices to be paid, as requested.
- Supports the production of member financial year end Tax Statements and answers related queries and issues.
- Enters new member details onto the relevant Membership Database as required.
- Discuss waiver and hardship fee options with members after seeking approval from the Growth Team Lead.
- Completes resignation processes of Unfinancial members.
- Produces previous year member tax statements as requested.
- Investigates discrepancies in current and previous member tax statements.
- Liaises with financial institutions and third-party payment platforms on disputed transactions.
- Assists other teams with refunds of member fees in line with current processes.
- Attend meetings with Growth and Communication and Engagement teams to review financial processes.
- Produces End of Month Reports for the Growth Team Lead, meeting strict deadlines in line with CPSU/CSA Union rules.

#### **iMIS – FINANCE PROCEDURE IMPROVEMENTS**

- Analyses and documents key membership finance functions, including arrears procedures and processes, and makes recommendations for improvements.
- Develops and implements process and system improvements for chasing arrears and Unfinancial members, making recommendations to the Coordinator Corporate Services, Growth Team Lead and Community Engagement teams.
- Assists and provides oversight and guidance about membership/iMIS issues, including contribution to finance processes and procedure improvement plans with Growth and Community Engagement teams.
- Collates key membership financial data when requested, including arrears, unfinancial members, suspensions, direct debit rejections, members of hardship rate and membership refunds.
- Makes recommendations related to the content and design of the Member Financials tab within the Member Portal.
- Monitors for errors, irregularities or inconsistencies related to new improvement procedures, reporting to the Communications and Engagement team.

#### **ACCOUNTING**

- Performs duties as requested by the Senior Accounts Officer – General or Coordinator Corporate Services including:
  - Answering queries regarding payments and invoices
  - Liaising with CPSU/CSA account signatories
  - Monitoring the Accounts Inbox
- Liaises with financial institutions and payment platforms, particularly for disputed payments and reversal of payment transactions.
- Provides support with auditor requests and End of Financial Year processes.

#### **ADMINISTRATION**

- Conducts Reception/Administration Assistant duties as requested by Coordinator Corporate Services.
- Completes administrative tasks as requested by Coordinator Corporate Services.
- Responsible for the distribution of outgoing and incoming mail in the absence of the Senior Records Officer.

Note: Where the name of a team or role is listed as at the effective date of this document, it is to be replaced by any role or team name change as titles become superseded during the life of this Job Description Form.

**Section 6 - Selection Criteria**

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Membership Accounts Administrator

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Level 2

Office No:  
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**SELECTION CRITERIA****Essential**

- Work effectively within a computer environment.
- Ability to utilise and maintain databases.
- Good working knowledge of Microsoft Office.
- Knowledge of basis accounting.
- Good working knowledge of accounting software and payment platforms.
- Good analytical skills and the ability to interpret data.
- Excellent verbal and written communication skills.
- Strong customer service skills.
- Strong organisational skills.
- Ability to meet deadlines.
- Committed to Unionism.
- Ability to work in a team.
- Ability to work unsupervised.

**Desirable**

- Previous experience working in a finance environment.
- Previous experience working in a union.

**Personal**

- Time management skills
- Responsible
- Accountable
- Adaptable, flexible and welcomes process improvements
- High attention to detail
- Reliable
- Empathetic

**Section 7 – Certification****CERTIFICATION**

The details contained in this document are an accurate statement of the duties, responsibilities, and other requirements of the position.

BRANCH SECRETARY	DATE:
OFFICE OCCUPANT	DATE: