### Job Family: Finance

<table>
<thead>
<tr>
<th>Job Family Summary:</th>
<th>Perform or manage student financial information into and out of Student Information Systems (SIS) at a school or university-wide, while ensuring compliance.</th>
</tr>
</thead>
</table>

### Job Family: Student Financial Services - Professional

<table>
<thead>
<tr>
<th>Job Title:</th>
<th>Student Financial Services Administrator III</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Code:</td>
<td>F1657P</td>
</tr>
<tr>
<td>Grade Level:</td>
<td>57</td>
</tr>
<tr>
<td>Exemption:</td>
<td>Exempt</td>
</tr>
<tr>
<td>Effective/Revision Date:</td>
<td>January 2017</td>
</tr>
</tbody>
</table>

### Core Duties

- Evaluate SIS workflows and processes, recommend improvements
- Work collaboratively with all areas throughout the University that send and receive student financial data
- Monitor service levels, address areas of concern
- Manage ongoing relationships with external vendors to ensure the organization receives satisfactory standards of service
- Create and maintain SIS training materials; act as a resource to school/unit staff
- Develop and distribute communications to internal and external constituencies
- May provide training to clients and staff
- May be responsible for electronic billing and federally mandated tax reporting
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations with focus on those pertaining to student financial services
### Basic Qualifications
- Bachelor's degree or equivalent work experience required
- Minimum of 5 years' relevant work experience

### Additional Qualifications and Skills
- Knowledge of Microsoft Office Suite, intermediate excel skills
- Knowledge of basic financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool

### Certificates and Licenses

### Physical Requirements

### Working Conditions
- Work is performed in an office setting
### Job Family Matrix

**Job Function:** Finance  
**Job Family:** Student Financial Services - Management

**Job Family Summary:** Perform or manage student financial information into and out of Student Information Systems (SIS) at a school or university-wide, while ensuring compliance.

<table>
<thead>
<tr>
<th>Job Title</th>
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<tbody>
<tr>
<td>Student Financial Mgt II</td>
<td>F1656M</td>
<td>56</td>
<td>Exempt</td>
<td>January 2017</td>
</tr>
<tr>
<td>Student Financial Services Mgt III</td>
<td>F1657M</td>
<td>57</td>
<td>Exempt</td>
<td>January 2017</td>
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<tr>
<td>Student Financial Services Mgt IV</td>
<td>F1658M</td>
<td>58</td>
<td>Exempt</td>
<td>January 2017</td>
</tr>
</tbody>
</table>

**Job Summary**

**Supervise staff and ensure compliance with student loan program regulations and departmental policies.**

**Manage operational activities related to Student Information Systems (SIS).**

**Manage all student financial information for Student Information Systems (SIS).**

**Core Duties**

- **Job Title: Student Financial Mgt II**
  - Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
  - Assist in developing departmental financial policies and procedures
  - Overseer loan system and general ledger balances
  - Participate in budget preparation and review
  - Collaborate with the department's leadership and managers on student financial operations
  - Assist in developing communication related to collections and loans
  - Ensure financial compliance with University policies and procedures and applicable legal rules and regulations with focus on those pertaining to student financial services

- **Job Title: Student Financial Services Mgt III**
  - Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
  - Evaluate SIS workflows and processes, recommend improvements
  - Work collaboratively with all areas throughout the University that send and receive student financial data
  - Monitor service levels, address areas of concern
  - Manage ongoing relationships with external vendors to ensure the organization receives satisfactory standards of service
  - Create and maintain SIS training materials; act as a resource to school/unit staff
  - Develop and distribute communications to internal and external constituencies
  - May be responsible for electronic billing and federally mandated tax reporting
  - Ensure financial compliance with University policies and procedures and applicable legal rules and regulations with focus on those pertaining to student financial services

- **Job Title: Student Financial Services Mgt IV**
  - Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
  - Provide direction and guidance to staff and customers in such areas as: loans, customer service, financial systems, and collections
  - Analyze metrics and identify opportunities to streamline processes; develop and implement action plans for improved procedures
  - Collaborate on the development of new SIS procedures within school/unit that support university-wide policies and initiatives
  - May be responsible for electronic billing and federally mandated tax reporting
  - Select and manage ongoing relationships with external vendors to ensure the organization receives satisfactory standards of service
  - Participate in planning for systems and policies including such activities as new system implementations and effective operationalization of new University/school policies
  - Ensure financial compliance with University policies and procedures and applicable legal rules and regulations with focus on those pertaining to student financial services
### Basic Qualifications
- Bachelor's degree or equivalent work experience required
- Minimum of 3 years’ relevant work experience
- Bachelor's degree or equivalent work experience required
- Minimum of 5 years’ relevant work experience
- Bachelor's degree or equivalent work experience required
- Minimum of 7 years’ relevant work experience
- Supervisory Experience

### Additional Qualifications and Skills
- Knowledge of Microsoft Office Suite, intermediate excel skills
- Knowledge of basic financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool
- Supervisory Experience
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool
- Supervisory Experience
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool

### Certificates and Licenses

### Physical Requirements
- Work is performed in an office setting
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### Job Family Matrix

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**Job Summary**

Responsible for the overall direction and oversight of student financial operations and systems. Develop and implement student financial policies.

**Core Duties**

- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Manage the operations of student loans and collections, cash receipts and student billing
- Manage the annual audit process
- Monitor support systems and business processes; develops and enhances new and enhanced processes
- Collaborate with university-wide leadership to continuously approve processes, policies and procedures
- Serve as a key resource for student financial policies, may provide training to clients and staff
- Develop policies needed to ensure the University has complete, accurate student financial records
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations
### Job Family Matrix

#### Basic Qualifications
- Bachelor's degree or equivalent work experience required
- Minimum of 8 years' relevant work experience
- Supervisory experience

#### Additional Qualifications and Skills
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial principles
- Knowledge of SIS

#### Certificates and Licenses

#### Physical Requirements

#### Working Conditions
- Work is performed in an office setting
- Frequent travel to other sites across the University is required