

Job Family Matrix

Job Function: Finance	Job Family: Student Financial Services - Professional
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.	
Job Title: Student Financial Services Administrator III	
Job Code: F1657P	
Grade Level: 57	Exemption: Exempt
Effective/Revision Date: January 2017	
Job Summary	
Administer operational activities related to Student Information Systems (SIS).	
Core Duties	
<ul style="list-style-type: none">• 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	

Job Family Matrix

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.			
Job Title: Student Financial Mgt II		Job Title: Student Financial Services Mgt III	
Job Code: F1656M		Job Code: F1657M	
Grade Level: 56 Exemption: Exempt		Grade Level: 57 Exemption: Exempt	
Effective/Revision Date: January 2017		Effective/Revision Date: January 2017	
Job Summary		Job Summary	
Supervise staff and ensure compliance with student loan program regulations and departmental policies.		Manage operational activities related to Student Information Systems (SIS).	
Core Duties		Core Duties	
<ul style="list-style-type: none"> • 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 • Oversee 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 		<ul style="list-style-type: none"> • 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 	
		<ul style="list-style-type: none"> • 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 	

Job Family Matrix

Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 3 years' relevant work experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 5 years' relevant work experience 	<ul style="list-style-type: none"> • Bachelor's degree or equivalent work experience required • Minimum of 7 years' relevant work experience • Supervisory Experience
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
Working Conditions	Working Conditions	Working Conditions
<ul style="list-style-type: none"> • Work is performed in an office setting 	<ul style="list-style-type: none"> • Work is performed in an office setting 	<ul style="list-style-type: none"> • 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.	
Job Title: Student Financial Services Mgt V	
Job Code: F1659M	
Grade Level: 59 Exemption: Exempt	
Effective/Revision Date: January 2017	
Job Summary	
Responsible for the overall direction and oversight of student financial operations and systems. Develop and implement student financial policies.	
Core Duties	
<ul style="list-style-type: none">• 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