CALIFORNIA STATE UNIVERSITY, FRESNO
Position Description Form

Employee Name: ________________________  Fresno State ID #: ________________________

Classification: Administrative Analyst/Specialist - Exempt II  Working Title: Financial Aid Systems Analyst

Prepared By (MPP/Chair): Kelly Russell  Department: Financial Aid and Scholarships Office

Bargaining Unit: R09  FLSA Status: Exempt  Date Prepared: 5/13/2021

POSITION DESCRIPTION

Overview:

Under the supervision of the Assistant Director of Systems, the Financial Aid Systems Analyst supports the mission of the department and the university by maintaining financial aid business processes and their interface with information systems. This is a vital position in the Financial Aid & Scholarships office, which also works collaboratively with a variety of University departments and their systems. Active participation in relevant committees/user group/list serves enhances this role. The Financial Aid Systems Analyst must combine the highest level of information systems competencies with an in-depth knowledge of the complex regulatory requirements.

Major duties of the job include:

- Oversee and coordinate the Financial Aid module of the PeopleSoft student information system with other campus departments
- Serve as primary technical and analytical support to the Financial Aid Assistant Director and Director, office staff, members of the campus community, and external groups and agencies
- Enhance and support technology-based systems for the various functions of the Financial Aid & Scholarships Office
- Maintain an in-depth knowledge of financial aid federal, state and institutional regulations and policies and how they are addressed by information systems
- Provide required financial aid data for all financial aid audits and reports
- Serve as a liaison with university Information Systems, Common Origination and Disbursement (COD), the California State University FA Module group and other technical groups
- Keep current with PeopleSoft system standards, change, trends and functions and will assess the impact on financial aid functions and operations
- Coordinate submission of federal and state mandated reports; assist in the preparation and submission of the annual Fiscal Operations and Application of Participate (FISAP) report to the U.S. Department of Education
- Test and implement any maintenance upgrades for the core student information systems
- Determine the functional and technical system requirements and specifications
- Evaluate, test, set up and troubleshooting of third-party software installation and upgrades
- Develop, design, analyze and evaluate ad hoc queries and reports using PeopleSoft Query Manager and SQL and make recommendations for new policies, procedures and business practices as needed to support the operational needs of the office
- Coordinate and process daily imprints and export of electronic Financial Aid records
- Ensure the integration and exchange of data with appropriate external data with appropriate external systems

Secondary duties of the job include:

- Demonstrate competence in independently applying technical judgement to standard and nonstandard applications and systems
- Evaluation of business requirements and information system components for user needs
- Consultation with staff to design and document business processes and work-flow issues
- Assist in the formulation of office goals, policy and procedures

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- Support and oversee document imaging system (OnBase)
- Serve on campus committees as assigned
- Other duties as assigned

**Supervisory Responsibility:**

<table>
<thead>
<tr>
<th>Who Supervises this Position:</th>
<th>Isela Reza-Rogers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is Responsible for completing the Performance Appraisal:</td>
<td>Kelly Russell</td>
</tr>
<tr>
<td>What other classifications does this position supervise:</td>
<td>Student Assistants</td>
</tr>
</tbody>
</table>

**Required Qualifications:**

**Education and Experience:**

- Bachelor’s degree from a regionally accredited college or university and/or equivalent training and administrative work experience involving study, analysis, and/or evaluation leading to the development or improvement of administrative policies, procedures, practices, or programs.
- A minimum of five years of professional experience in financial aid administration
- Experience within financial aid or enrollment management may be substituted for a maximum of two years of experience on a year-for-year basis

**Knowledge, Skills, and Abilities:**

- Assess, formulate, and evaluate the impact of recommended or implemented policies from a strategic and operational perspective
- Work requires regular participation in planning and development activities and, as required, independent determination of methods to meet programmatic or administrative goals
- Influence over key objectives and longer-term goals of an organizational unit and/or program with high visibility or broad impact within and outside the organization
- Ability to learn, interpret and apply a wide variety of policies and procedures relating to and impacting financial aid
- Independent determination of approaches to project and priorities. Work is reviewed against overall goals and objectives, with full accountability for results
- Use of appreciable judgment in the development of policies and procedures related to issues frequently not covered by existing policies and procedures. Precedents and policies to guide development activities may be used for reference
- Ability to take initiative and independently plan, organize, coordinate, and perform work in various situations where numerous and diverse demands are involved
- Use of appreciable ingenuity and innovation to conceive of new approaches and solutions to address complex problems and issues
- Serve as the prime contact for the program, specialty, and/or organizational unit. May manage relationships with outside entities or agencies and manage sensitive information and situations
- May oversee day-to-day program or organizational unit operations and provide lead work direction to other professional or administrative staff, with accountability for results
- Ability to use innovation and ingenuity to conceive new approaches and solutions to address complex problems
- Thorough knowledge of and ability to apply extensive expertise to complex programs and/or administrative specialties, including pertinent laws and regulations

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Demonstrated expertise in and advanced knowledge of the principles, problems, and methods of public and business administration and operational and fiscal management

Expertise in administrative survey techniques, operations and systems analysis, statistical and research methods, and the ability to interpret and evaluate results to develop sound conclusions and recommend new or revised policies

Ability to understand problems from a broad, interactive perspective and discern applicable underlying principles to conceive of and develop strategic solutions

Ability to work with representatives from public and private entities and handle potentially sensitive situations

Demonstrated consultative skills in working with internal and external constituent groups

Ability to effectively present ideas and concepts in written or presentation format and use consultative and facilitation skills to gain consensus

Specialized Skills:

- Demonstrated expertise in and knowledge of computing systems and automated environments
- Thorough knowledge of Microsoft Windows and Microsoft Office including Microsoft Excel, Word and Outlook
- Thorough knowledge of the technical aspects of the PeopleSoft Financial Aid module including the processes, forms and reports
- Possess leadership skills
- Familiarity with Hyland OnBase
- Experience with PeopleSoft CampusSolutions
- Knowledge of PeopleSoft Query Manager, tables and processes
- Knowledge of Structured Query Language (SQL) for relational database systems as well as PeopleTools

Preferred Qualifications:

- In-depth knowledge and understanding of system programming
- Ability to write programs
- Familiarity with CampusLogic: StudentForms
**Position Description Form**

**Department:** Financial Aid and Scholarships Office

**Position:** Financial Aid Systems Analyst

**Date Prepared:** 5/13/2021

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**WORKING ENVIRONMENT**

Check the appropriate box which most accurately describes the extent of the specific activity performed by the employee on a daily basis. If the activity is performed less than one (1) hour each day, check the N/A box.

### PHYSICAL EFFORT

<table>
<thead>
<tr>
<th>Activity</th>
<th>Number of hours/day</th>
<th>N/A</th>
<th>1-2</th>
<th>3-4</th>
<th>5-6</th>
<th>7+</th>
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<tbody>
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<td>Bending Over</td>
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<td>Crawling</td>
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<td>Reaching overhead</td>
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<td>Crouching</td>
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<td>Kneeling</td>
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<td>Pushing or pulling</td>
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12. Lifting or carrying

13. Repetitive use of hands/arms

14. Repetitive use of legs

15. Eye/hand coordination

<table>
<thead>
<tr>
<th>Activity</th>
<th>Number of hours/day</th>
<th>N/A</th>
<th>1-2</th>
<th>3-4</th>
<th>5-6</th>
<th>7+</th>
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<tbody>
<tr>
<td>Driving cars, trucks, forklifts and</td>
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<td>other equipment</td>
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<td>Being around scientific equipment and</td>
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<td>machinery</td>
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<td>Walking on uneven ground</td>
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**MENTAL EFFORT**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Number of hours/day</th>
<th>N/A</th>
<th>1-2</th>
<th>3-4</th>
<th>5-6</th>
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<tbody>
<tr>
<td>Directing Others</td>
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<td>Using math/calculations</td>
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<td>Remembering names</td>
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<td>Working rapidly</td>
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</tbody>
</table>

1. Inside

2. Outside

3. Humid

4. Hazards

5. High places

6. Hot

7. Cold

8. Dry

9. Wet

10. Change of temp

11. Dirty

12. Dusty

13. Odors

14. Noisy

15. Working With others

16. Working around others

17. Working alone

**ENVIRONMENTAL FACTORS**

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<tbody>
<tr>
<td>discrimination</td>
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