<table>
<thead>
<tr>
<th>Internal Team:*</th>
<th>SL-Univ Fin Svc-Student Accounts - 126300</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Code/Employee Classification:*</td>
<td>Accounting Technician III</td>
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<tr>
<td>Job Code:</td>
<td>1740</td>
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<td>MPP Job Code:</td>
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<tr>
<td>Position Number:</td>
<td>New Position # Request</td>
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<tr>
<td>Position no:</td>
<td>SL-00011032</td>
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<tr>
<td>CSU Working Title:*</td>
<td>Financial Services Representative</td>
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<tr>
<td>Reports To:*</td>
<td>Director Student Fin Svcs</td>
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<tr>
<td>Campus:*</td>
<td>San Luis Obispo</td>
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<tr>
<td>Division:*</td>
<td>Administration and Finance</td>
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<tr>
<td>College/Program:*</td>
<td>University Financial Services</td>
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<tr>
<td>Department:*</td>
<td>Univ Fin Svc-Student Accounts - 126300</td>
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<tr>
<td>FLSA Status:</td>
<td>Exempt</td>
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**POSITION INFORMATION**

**Job Summary/Basic Function:**
Under the general direction of the Assistant Director of Student Financial Services, this position performs a wide-range of technical functions in support of the operations of Student Accounts and its role in receiving and disbursing university funds and recording financial transactions. Assigned duties for this position may focus on a particular technical specialization or program area, such as accounting for housing and dining transaction, fee waivers, receivables or collection activities, or may include duties that cross several programs or specialties within Student Accounts.

**Minimum Qualifications:**
- Equivalent to four years of progressively responsible financial record-keeping experience. (Any equivalent combination of education and experience, which provides the required knowledge and abilities, may be substituted for the required experience).

**Required Qualifications:**
1. Thorough knowledge of financial record-keeping methods, mathematical and general office methods, procedures, and practices.
2. Ability to apply accounting procedures and practices to the analysis of basic accounting problems and practices to the analysis of basic accounting problems; analyze and interpret accounting data; apply problem solving techniques in finding solutions to basic accounting problems.
3. Working knowledge of and ability to apply fundamental concepts, principles, and techniques applicable to the operations of an office that is responsible for proper recording and analysis of financial related entries. Must be able to develop conclusions and make recommendations regarding the data and transactions.
4. Knowledge of policies, procedures, and outside regulations pertaining to the operations of the Student Accounts Office, or experience in a similar field when applicable policies, procedures, and regulations must be followed.
5. Ability to take initiative and independently plan, organize, coordinate, and perform work in various
situations where numerous and diverse demands are involved.
6. Ability to effectively provide work direction and train other staff.
7. Ability to follow oral and written instructions.
8. Ability to compute and post figures rapidly and accurately and ability to operate standard office machines, calculator, personal computers and/or automated accounting system.
9. Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
10. Ability to use tact and diplomacy to effectively handle a broad range of high level and sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts and problems.
11. Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
12. Excellent communication skills; ability to effectively communicate information in a clear and understandable manner, both verbally and in writing.
13. Ability to interpret, communicate and apply policies and procedures.
14. Demonstrated ability to maintain a high degree of confidentiality.
15. Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
16. Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email.
17. Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.

Preferred Qualifications:

1. Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
2. General knowledge of the PeopleSoft Student Financials module and the effect and outcome of operations performed.
3. General knowledge of financial aid funding and programs.
4. Experience in a university environment and knowledge of its organizational structure and the various offices and their respective responsibilities within the university.

Special Conditions:

1. Must be willing to travel and attend training programs off-site for occasional professional development.
2. Must be able to work overtime, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.
3. The person holding this position is considered a ‘mandated reporter’ under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.
4. Must be able to successfully pass a pre-employment background/fingerprint check.
5. This position classification has been defined as non-exempt and is subject to overtime provisions of the Fair Labor Standards Act (FLSA).

License / Certification:

Mandated Reporter:* Limited - The person holding this position is considered a limited mandated reporter under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083, revised July 21, 2017.

NCAA: ☐ Yes ☐ No
Conflict of Interest:* None
Supervises Employees:* ☐ Yes ☐ No

Job Duties

Job Duties

<table>
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<tr>
<th>% of time</th>
<th>Duties / Responsibilities</th>
<th>Essential / Marginal</th>
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https://calstate.dc4.pageuppeople.com/v5.3/provider/manageJobs...SbwBTat-Spt28zYeRmK5GU_a3Sz7isQPFP7BuqVEzTVfnUyU20nFf5zQ%7e%7e
1. Perform a variety of specialized or general technical support functions in support of the day-to-day operations of Student Accounts.

2. Provide a wide range of functional expertise in the areas of financial analysis, accounting and administration of accounts, contract, vendor and third party administration (both internal and external to the university), and act as an internal and external resource on policies and procedures.

3. Understand and interpret Student Accounts and University policies and procedures for proper application to student accounts and provide clarification for other staff when extensive interpretation is required.

4. Review and analysis of student account activity in order to provide assistance to and answer questions, both general and specific, for students, supporters and other faculty or staff.

5. Balance and reconcile assigned accounts; create and maintain spreadsheets, including entering, revising, sorting, calculating and creating tables; maintain accounting of financial aid records.

6. Assist with or coordinate the use of office automation, both manual and electronic, by imaging documents, posting batch transactions, running programs and processes, reviewing results, and recommending actions to management for improvements.

7. Develop new methods, modify and document established procedures based on university policies and establish new procedures as necessary.

8. Assemble and compile data used in the generation of financial reports and/or analysis.

9. Create, troubleshoot, modify, run, analyze and export advanced queries.

10. Perform a wide variety of duties requiring considerable judgment, initiative, and independence, which may include: third party billing; collection of student fees; generating of 1098T forms; running refunding processes; generating mass emails; reconciliation and posting of charges; and verifying that processes run successfully.

11. Plan and prepare monthly adjusting and year-end closing journal entries to appropriately record university financial activities.

12. Perform analysis of accounts using queries, reports or other tools, and based on the criteria provided; identify students meeting those criteria for the purpose of identifying issues or corrections that may be needed (e.g. unapplied payments).

13. Perform testing of financial software for upgrades and implementations as related to the position including such activities as testing processes and validating system functionality and data.

14. Participate in various meetings to communicate established university policies and procedures to faculty, staff and the general public, including those that require extensive interpretation.
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<td><strong>1.</strong> Perform other job-related duties and special projects as assigned.</td>
<td>Marginal</td>
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<td><strong>2.</strong> Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.</td>
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<td><strong>3.</strong> Provide direction or training to other staff for cross-training purposes and transfers of assignments for operational needs.</td>
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<td><strong>4.</strong> Review web pages for necessary changes and advise management of recommended improvements.</td>
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<td><strong>5.</strong> Participate in various events intended to distribute information about the general activities of Student Accounts, including SLO Days and WOW.</td>
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**USERS AND APPROVALS**

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