



POSITION DESCRIPTION / CLASSIFICATION REVIEW FORM

The position description is the foundation for recruitment, determination of classification, formulation of work plans and the basis for performance management and evaluations. Supervisors are expected to review the position description with the employee: (1) when the employee begins the new assignment; (2) when the position description is revised; and (3) when the position is evaluated. Please note whenever there is a substantial change in the assignment, the position description should be revised and submitted to Human Resources to determine if there is a classification impact. This form is available on the HR webpage.

Name of current incumbent (if filled position):		Date: 10/23/2024
<i>If vacant, name of previous incumbent:</i> Andrea Olivo		
Job (Classification) Code: 1730/1	Job Title: Accounting Technician I	Position #: 1704 (HR use only)
Working Title (optional): Student Financial Services Representative		<input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt
Department ID: D21140	Department Name: Student Financial Services	Time Base: Full-time, 1.0

A. ACTION REQUESTED:

Recruitment:

- New position
- Replacement:
 - No review required
 - Review needed – substantial changes made

Classification Review: (Section J required, Cabinet Officer signature required)

- Initiate classification review (Organizational Chart must be attached)
- Requested by:* Employee Supervisor/Administrator CSU/HR

Update existing position description:

- No review required
- Review needed – substantial changes made

B. SIGNATURES: Signature denotes that this position description is an accurate statement of assigned duties. As a supervisor, if you are not in agreement with duties described, please attach additional sheet describing the differences which will be used for additional review by Human Resources. This job description supersedes all prior job descriptions and is intended to describe the general content and essential requirements for the position listed above. It is not an exhaustive statement of duties. Management reserves the right to add or change the duties of this position as required at any time.

(Employee) (Date)

(Supervisor) (Date)

(Appropriate Administrator) (Date)

(Cabinet Officer) req'd for classif. reviews (Date)

C. POSITION PURPOSE: Please describe the basic primary function(s) of the position – the reason the position exists. In order to provide an accurate description of the position, please do not copy duty statements from the CSU Classification Standards.

Under the general supervision of the Director of Accounting and Reporting - Student Financial Services (SFS), the Student Financial Services Representative is often the first point of contact regarding student accounts receivable. This position provides a wide variety of standard information to students, parents, and the public regarding tuition and fees and student account status. This position investigates and resolves routine issues related to student accounts, and posts charges, credits, and adjustments to student accounts.

D. DUTIES AND RESPONSIBILITIES: List 4 or 5 of the most significant or major duties in order of importance as well as marginal duties. Indicate the approximate percentage of time spent with percentages of no less than 5%. Total of all duties must add up to 100%.

1) MAJOR JOB DUTIES (Essential Functions)	PERCENTAGE %
A. Student Financial Services Customer Service	40%
B. Post Transactions to Student Accounts	25%
C. University Receivable/Collections	15%
D. Data Compilation & Reporting	10%
 2) OTHER JOB DUTIES (Marginal Duties)	 10%
<ul style="list-style-type: none"> • Perform other job-related duties and special projects as assigned. • Attend training and maintain skill currency as appropriate to safely and effectively complete assignments. 	

The examples above illustrate typical work activities and are not meant to be all inclusive or restrictive.

Total = 100%

DUTY STATEMENTS (give examples of tasks under each heading):

A. Student Financial Services Customer Service (40%)

- a) Assist students, parents, and the public at the Student Financial Services window (in-person), over the phone, and via Zoom, email, and other technology, providing standard information and assistance on forms and processes such as Installment Pay Plan, Miscellaneous Refund Application, Check Stop Payment Request, Petition for Reversal of Fees, and IRS form 1098-T.
- b) Communicate a wide variety of basic information to students, such as student account balance, student account service indicators, tuition and fee rates, payment options, and student refunding.
- c) Help coordinate with Student Financial Services student assistants to ensure delivery of best-in-class customer service.
- d) Ensure signage, website, voicemail greetings, handouts, and other routine information sources are current and correct.
- e) Direct students to the appropriate campus resources based on standard procedures.
- f) Identify and correct routine account discrepancies, referring more complex issues to appropriate higher-level staff or a supervisor.

B. Post Transactions to Student Accounts (25%)

- a) Quickly and accurately post charges and credits to student accounts, following established procedures.
- b) Accurately post corrections to student accounts and reapply payments as needed.
- c) Upload transactions to student accounts via PeopleSoft's external file load functionality.
- d) Post various standard charges and credits to student accounts, including routine write offs.
- e) Assist with troubleshooting payment application issues, duplicate charges, etc., referring unresolved problems to higher-level staff or a supervisor.

C. University Receivables/Collections (15%)

- a) Place and remove service indicators and post comments to student accounts.
- b) Collect Petition for Reversal of Fee forms, organize documents for monthly Petition Committee meeting, and process forms as needed, based on Petition Committee decisions.
- c) Process returned check and ACH payments according to established procedures.
- d) Actively call students with past due balances.
- e) Create, review, and send standard monthly billing and other account notices.

D. Run Reports & Compile Data (10%)

- a) Run routine reports/queries to monitor accurate processing of student accounts.
- b) Accurately track a variety of departmental processes.

- c) Use spreadsheets to compile statistics and trends.

E. REQUIRED QUALIFICATIONS: These should match those listed on the classification standards. Any supplemental qualifications should be listed as "preferred".

- 3) **EDUCATION AND EXPERIENCE:** Equivalent to one (1) year of clerical accounting or financial record keeping experience and recent customer service experience. A combination of education and experience which provides the required knowledge and abilities may be considered.
- 4) **LICENSES, CERTIFICATES, CREDENTIALS:** N/A
- 5) **SKILLS, KNOWLEDGE, ABILITIES (SKA's):**
- Regular and reliable attendance is required.
 - Ability to review financial documents for accuracy, completeness, validity, and adherence to standards.
 - Ability to compute and post numbers rapidly and accurately, maintain files, and records.
 - Expertise in investigating and analyzing problems. Ability to anticipate problems and address them proactively.
 - Ability to collect, interpret, edit, and summarize data.
 - Proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, and collaborative calendaring and email software.
 - Knowledge and competence in Microsoft Word, Excel, and PowerPoint.
 - Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
 - Ability to use tact and diplomacy to effectively handle a broad range of sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts & problems.
 - 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.
 - Written and oral communication skills; thorough knowledge of English grammar, punctuation, and spelling with a demonstrated ability to produce professional communications that meet high standards for appearance, grammar, spelling, and clarity.
 - Ability to review, analyze, interpret, communicate, and apply policy and standards.
 - Demonstrated ability to maintain a high degree of confidentiality.
 - Strong organizational and time management skills, ability to remain flexible to meet customer demand levels.
 - Working knowledge of or ability to quickly learn University infrastructure, academic and administrative structure, policies and procedures.

F. PREFERRED QUALIFICATIONS: Note any additional knowledge, skills, experience, certificates, education, or licenses that are desired for this position.

- Experience in PeopleSoft Student Finance system.
- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.

G. SPECIAL CONDITIONS:

- Must be willing to travel and attend training programs off-site for occasional professional development.
- 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.
- **BACKGROUND CHECK:** Satisfactory completion of a background check (including a criminal records check) is required for employment. CSU will make a conditional offer of employment, which may be rescinded if the background check reveals disqualifying information, and/or it is discovered that the candidate knowingly withheld or falsified information. Failure to satisfactorily complete the background check may affect the continued employment of a current CSU employee who was conditionally offered the position.
- **SENSITIVE POSITION:** Sensitive positions are designated by the CSU as requiring heightened scrutiny of individuals holding the position, based on potential for harm to children, concerns for the safety and security of the people, animals, or property, or heightened risk of financial loss to the CSU or individuals in the university community.
- **MANDATED REPORTER:** Not a mandated reporter.
- **EQUAL EMPLOYMENT OPPORTUNITY:** This University is committed to Equal Employment Opportunity. Applicants will be considered without regard to gender, race, age, color, religion, national origin, sexual orientation, genetic information, marital status, disability or covered veteran status.

H. PHYSICAL DEMANDS & WORK ENVIRONMENT (must be completed):
Indicate the type of physical effort which is essential to the position activities:

- SEDENTARY WORK** – involves mainly sitting; minimal walking and standing; lifting light weight objects limited to 15 pounds.
- LIGHT WORK** – involves mainly sitting, up to 25% standing or walking; lifting medium weight objects limited to 25 pounds.

MEDIUM WORK – up to 40% of the activities involve sitting, standing, squatting, kneeling or walking; lifting heavy weight objects limited to 50 pounds; may involve pushing and pulling objects within the weight limits.

HEAVY WORK – 50% or more of the activities involve walking, standing, squatting, kneeling or climbing; lifting heavy weight objects which may exceed 50 pounds.

Indicate the type(s) of environmental factors which are essential to the position activities:

- Is exposed to excessive noise
- Is around moving machinery
- Is exposed to marked changes in temperature and/or humidity
- Is exposed to dust, fumes, gases, or radiation, microwave
- Drives motorized equipment
- Works in confined quarters
- Works in high places
- Other:
- N/A

I. SUPERVISION:

Supervision Received: Describe the nature of supervision the employee in the position will receive.

- Direct Supervision - Employee receives immediate, close and regular supervision
- General Supervision - Employee receives some delegation of responsibility and independence
- General Direction – Employee functions independently under broad guidelines
- Administrative Direction – Responsibilities are defined by the scope of the organizational functions; responsible for formulating operational policies for a comprehensive and diversified program; makes top level management decisions. (Management Only)

Name of Supervisor: Christina Orozco	Job (Classification)Title: Interim Director of Student Financial Services, Administrator II
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Supervision Given: List name(s) and title(s) of employee(s) that this position will supervise directly (if applicable):

Name:	Job (Classification)Title:
N/A	

J. CLASSIFICATION REVIEW REQUESTS: If this is an existing position that you believe has changed, describe what is different about the assignment in terms of responsibility, complexity, authority, and skill levels. In order to assist you with this analysis, please answer the following questions. **Include organizational chart.** If necessary, attach additional sheets.

1. Which parts of the assignment are the most difficult and/or require the greatest skill to perform? Why? Please give examples.
2. To what extent do the duties of this position involve independent action or require decisions on the part of the person in the position? Which, if any, are the most difficult, and how frequently do they occur?
3. What would be the probable result of a poor judgment, decision, or action by the person in this position? How would these errors be detected? What would be the consequence of the errors?
4. How is work assigned to this position? To what extent does the person in this position have authority to determine what is to be done and when?

5. In what way is the work of this position reviewed? That is, is work spot-checked or is all work reviewed? Are there standardized controls or checks which would normally catch errors made by the person in the position? Please explain.
6. Do you assist in developing departmental policy? If yes, please explain.
7. Does this position have supervisory responsibility? Please specify.

Additional comments: (optional) Clarify duties assigned and/or include any additional information that you think would be helpful in the review of this position.