



POSITION DESCRIPTION

Department: EMS Operations/Admissions & Registrar

Working Title: Transfer Credit Processing Specialist

Job Code: 1032

Time Base: 1.0

Position Number: 00000890

Union / Unit (if applicable): California State University Employees' Union (CSUEU) / Unit 7

Position Reports To: Assoc Dir of Admissions

Classification: Administrative Support Assistant II

Range Code: 2

Exempt or Non-Exempt: Non-Exempt

Last Update: 07/02/2021

PURPOSE OF POSITION:

The Transfer Credit Processing Specialist provides ongoing functional support for areas in Enrollment Management Services by scanning and indexing paper transcripts into the document imaging, archival and retrieval system. The position is responsible for the subsequent data entry of the scanned transcripts into the student information system for both new students and continuing students by entering transfer coursework into the External Education component of PeopleSoft. Reviews data input against source documents for accuracy and edits as needed. Researches and evaluates all documents for accuracy and completeness to ensure the correct data is entered.

MAJOR RESPONSIBILITIES:

	<u>% of Time</u>
Scanning documents and verification of scanned materials.	40%
Data entry/validation of transfer course work	55%
Other related administrative support	5%

LIST OF TASKS FOR EACH MAJOR RESPONSIBILITY:

Scanning documents and verification of scanned materials.

- Using imaging hardware and software, manually scan, verify and post document data for campus wide use.
- Utilize reports and inquiries to clean-up data from scanning process.
- Collaborate with employees in EMS to prioritize records for scanning and verification.
- Maintain logs of document scanning process.
- Initiate posting of scanned data to server.
- Supervise students in the scanning process.

Data entry/validation of transfer coursework

- Working independently, data enter (using computer terminal/keyboard/mouse) students' transfer course information into the degree audit module of the student information system following procedures with a high level of accuracy and meeting weekly goals for production quantity.
- Make corrections/adjustments and input articulation overrides as needed.
- Retrieve imaged student documents using the document imaging and management system.
- Correctly and accurately read annotated academic transcripts from other educational institutions and various other imaged source documents and interpret the notations marked upon these transcripts/documents by Admissions Advisors and Records and Registration Evaluators.
- Proof/verify accuracy and completeness of entered data by reviewing online student history, reviewing online and hardcopy internal transcripts, and performing arithmetic calculations to verify credit totals. Verify all data exists in student information system to produce an accurate degree audit.
- Maintain strict confidentiality of student records in accordance with law and CSU and CSU San Marcos policies and procedures.
- Identify missing institutions in degree audit system and submit request for creation of additional institution codes.
- Utilizing digital images of application data, verify and process applications to prepare them for evaluation.
- Using the imaging and degree audit software, proof/verify accuracy and completeness of auto-loaded data by reviewing scanned data and comparing existing transfer course data student in the student information system.
- Modify and correct auto-loaded data as necessary in the degree audit module.
- Submit requests for error review as needed.

Other administrative support

- Attend and participate in EMS Operations/ Admissions & Registrar meetings, division retreats and planning sessions.
- Attend appropriate or assigned campus wide events.
- Assist with EMS activities to support start of semester or other peak periods.
- Serve on EMS or department committees as requested.
- Other related duties as assigned

PROVIDES LEAD DIRECTION OF OTHERS:

N/A

REQUIREMENTS OF POSITION:

1. List education and experience required

- Three years of progressively responsible administrative/office experience with knowledge of office methods, procedures and practices; or an equivalent combination of education and experience.
- Experience involving accurate data entry and verification preferred.
- Experience working in academic setting preferred.

2. List knowledge, skills, and abilities required for this position.

- Ability to handle telephone inquiries, high-volume work production in a busy environment, and meet deadlines
- Ability to differentiate and work with a alpha-numeric, color-coding file system
- Ability to demonstrate an awareness and appreciation of the cultural diversity of the University community, and establish and maintain cooperative and effective relations with University employees, students and the public
- Must have a thorough knowledge of English grammar, spelling, and punctuation; interpersonal skills, written and oral communication skills, as well as a demonstrated commitment to the principles of diversity and multiculturalism
- Thorough knowledge of office methods, procedures and practices
- Ability to apply independent judgment, discretion and initiative to address problems and develop practical and thorough solutions
- Ability to perform routine data processing of forms and information
- Must be computer literate (database, electronic mail, word-processing, and spreadsheet applications in a PC Windows environment)
- Ability to organize work effectively and prioritize workload
- Ability to develop and maintain accurate files and records
- Discretionary judgment in dealing with confidential data
- Ability to perform standard arithmetic functions of a transactional nature, including tracking and comparing data
- Demonstrated competence in effectively presenting standard information in writing
- Ability to understand, interpret, and communicate procedures, policies, information and instructions
- Excellent customer service and interpersonal skills to deal effectively with applicants, students, parents, counselors and campus employees

3. List machines, tools, equipment, and motor vehicles used in the performance of the duties

- Personal computer, telephone, fax, document scanner, folding machine, copier, shredder.

4. Unique working conditions

- This position is subject to a background check including, but not limited to, employment verification, education verification, reference checks and criminal record checks. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.
- Must participate in required campus trainings including, but not limited to, Information Security Awareness Training and Sexual Violence Awareness and Prevention "EDU: Eliminate Campus Sexual Misconduct".

PURPOSE AND NATURE OF WORK RELATIONSHIPS:

General Public	To answer phone and electronic inquiries	Daily
Applicants	To answer phone and electronic inquiries	Daily
Staff	Issues of file status, received mail, file documents, reports	Daily

PHYSICAL EFFORT:

Check the appropriate box for each of the following items which most accurately describes the extent of the specific activity performed by this employee on a daily basis.

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Sitting				X	
2. Standing		X			
3. Walking		X			
4. Bending Over	X				
5. Crawling	X				
6. Climbing	X				
7. Reaching overhead	X				
8. Crouching	X				
9. Kneeling	X				
10. Balancing	X				
11. Pushing or pulling	X				

- 16. Driving cars, trucks, forklifts and other equipment
- 17. Being around scientific equipment and machinery
- 18. Walking on uneven ground

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
12. Lifting or carrying					
A. 10 lbs or less		X			
B. 11 to 25 lbs	X				
C. 26 to 50 lbs	X				
D. 51 to 75 lbs	X				
E. 76 to 100 lbs	X				
F. Over 100 lbs	X				
13. Repetitive use of hands/arms					X
14. Repetitive use of legs	X				
15. Eye/hand coordination				X	

Yes	No
	X
	X
	X

MENTAL EFFORT

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Directing others	X				
2. Writing		X			
3. Using math/calculations		X			
4. Talking				X	
5. Working at various tempos			X		
6. Concentrating amid distractions					X
7. Remembering names	X				
8. Remembering details			X		
9. Making decisions			X		
10. Working rapidly			X		
11. Examining/observing details					X
12. Discriminating colors	X				

ENVIRONMENTAL FACTORS

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Inside					X
2. Outside	X				
3. Humid	X				
4. Hazards	X				
5. High places	X				
6. Hot	X				
7. Cold	X				
8. Dry	X				
9. Wet	X				
10. Change of temp	X				
11. Dirty	X				
12. Dusty	X				
13. Odors	X				
14. Noisy	X				
15. Working w/others					X
16. Working around others					X
17. Working alone		X			

SIGNATURES

The last sheet for any staff position description should contain the signature sheet. Signatures will include the incumbent's signature (if applicable) or new employee; the supervisor's signature and all pertinent administrative personnel.

Employee

Print Name: _____

Signature: _____

Date: _____

Appropriate Administrator (MPP)

Print Name: _____

Signature: _____

Date: _____

Dean/Department Head/Director/AVP (optional)

Print Name: _____

Signature: _____

Date: _____