Staff / MPP Position Description

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| HR USE ONLY | |
| Conflict of Interest (COI) Designated:  Yes  No    Mandated Reporter:  Limited  General  N/A | **HR Reviewed By & Date:** |

Conflict of Interest Per Political Reform Act of 1974

If the person holding this position is considered a ‘Conflict of Interest Designate’, under the Political Reform Act of 1974. They are required to comply with the requirements set forth in Conflict-of-Interest codes as a condition of employment.

Mandated Reporter Per CANRA

If the person holding this position is considered a ‘mandated reporter’, under the California Child Abuse and Neglect Reporting Act. They are required to comply with the requirements set forth in [CSU Executive Order 1083](https://calstate.policystat.com/policy/10927154/latest/#attachments/c69e6c3b-de81-4119-9dcb-ead514145a9a/EO-1083%20AttachB_Final%20Draft.pdf) as a condition of employment.

# SECTION I. POSITION INFORMATION

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| **Reason for Position Description (Please check all that apply):** | Classification Review  Update Position Description  New Position  Existing Position  Temporary Reassignment  Permanent Reassignment  Recruitment |
| **This position description is being submitted by:** | Employee  Supervisor/Lead  Dean/Chief Administrator |
| **Effective Date:** | 7/1/2024 |
| **Division:** | Administration & Finance |
| **Department:** | Student Financial Services |
| **Employee Name:** |  |
| **Humboldt Employee ID:** |  |
| **Current Classification:** | Admin Analyst/Specialist I |
| **Position Number:** | 0002388 |
| **FLSA Status:** | Exempt (not overtime eligible)  Non-exempt (overtime eligible) |
| **Working Title:** | Sponsored Programs Foundation and In-House Loans Coordinator |
| **Time Base:** | 1.0 |

# SECTION II. PURPOSE OF POSITION

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| **State the basic purpose of the position in one or two specific statements.** | Under the direct supervision of the Student Accounts Manager, the In-House Loans and SPF Specialist performs duties involving day-to-day routine, responsible accounting activities for the University. Including university and student account analysis, customer service, financial record-keeping, recording of financial transactions, reconciliation of financial data, and assisting the campus community with questions and problems of a financial nature. The position will perform duties involving routine student financial services accounting and general accounting activities, providing supporting documentation in accordance with the CSU or University’s policies and assisting to help ensure compliance with internal and external policies as they apply to student financial services. The office serves students, staff, faculty, campus departments and the general public at a walk-up service counter, by e-mail, text messaging and by telephone. |

# SECTION III. MAJOR RESPONSIBILITIES

List the major responsibilities/functions of the job in descending order from the most important to the least important. Indicate approximate percentage of time spent in each (percentages should not be less than 5%). An Essential Function is a job-related task that is essential to the job. A marginal function is a job-related task that is not an essential aspect of the job. Essential Functions and Marginal Functions should have a combined total of 100%.

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| **Description of Major Responsibilities:** | **Essential Functional or Marginal Function ?** | **(%) Percent of Time** |
| Lead Analyst of the campus California Dream Loan Program and the CALSWEC Social Work Program- post payments on students account in the ECSI software. Submit advances, post incoming student payments and prepare monthly reconciliations or reports to campus departments. Investigate discrepancies or disputes, analyze collection activities and insure appropriate placements. Assist students with exit interviews, loan consolidation, deferments, or cancellations. Quarterly review of un-collectable debt and assignments to the Department Of Education. Identify potential accounting problems and recommend corrective action. Submissions of delinquent accounts to Third Party Collection Agencies, monthly reconciliation of agency placements and researching updates to the bankruptcy laws. Analysis of student account activity, investigating discrepancies and/or disputes using general knowledge of the financial aid disbursement process, fee assessment process and payment application processes. | Essential | 35% |
| Responsible for processing all student stipends. Review request forms, verify completeness, coordinate with Financial Aid, request funds transfers, process stipends, and communicate awards to students. Verify appropriate payments, confirm student eligibility, investigate discrepancies, and submit return of funds transfers as needed. | Essential | 30% |
| Post and facilitate Sponsored Programs Foundation third party tuition payments. Coordinate with Financial Aid and verify student eligibility. Investigate and resolve discrepancies. Process third party billings during the semester and verifying that funds are received. | Essential | 15% |
| Coordinate various cashiering and data entry functions for all incoming Sponsored Programs Foundation payments for the University. Responsible for communicating and coordinating with Accounting and Sponsored Programs Foundation to solve payment issues. Provide support and assistance to the Sponsored Programs Foundation office to accommodate changes in business processes, create efficient procedures, and establish written procedures/processing documents. | Essential | 15% |
| Other duties as assigned | Marginal | 5% |
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| **Total =100%** | | 100% |

# SECTION IV. CHANGES IN RESPONSIBILITES

1. What overall percentage of changes occurred in the assigned duties and responsibilities since the position was filled or the last review? Be specific. If responsibilities have increased or decreased, which ones and in what way? What new duties were added and what did they replace?

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| **Changes in Responsibilities:** | **(%) Percent of Change** | **Date Changed** |
| New responsibilities in SPF coordination for student stipends, third party payments, and coordination of incoming payments | +60% | 7/1/2024 |
| Decrease in in-house loan program with the liquidation of Perkins Loans | -5% | 7/1/2024 |
| Removal of daily cash reconciliation and verification | -20% | 7/1/2024 |
| Reduction of other duties as assigned | -5% | 7/1/2024 |

1. *Did the new duties transfer from another employee? If so, which employee? If the added duties*

*replace other assignments, what will happen to the duties that were removed? (List other positions*

*affected and summarize impact, if applicable.)*

# SECTION V. WORK DIRECTION OVER OTHERS

If this position leads (or manages/supervises if MPP) other positions, then list the classifications. Indicate type of direction, whether direct (directly supervises the position and conducts performance evaluation, MPP Only) or indirect (acting in a lead capacity or assigning work).

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| **Classification** | **Working Title** | **Type of work direction**  **(Direct or Indirect)** |
| Account Tech II | Cashier | Indirect |
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# SECTION VI. POSITION REQUIREMENTS:

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| **List education and years of experience required, as listed in Classification Standards. If applicable, include necessary certificates and licenses (Driver’s License).** | Entry to this classification requires general knowledge and skills in the applicable administrative and fiscal analysis field with a foundational knowledge of public administration principles, practices, and methods.  This foundation would normally be obtained through a bachelor's degree 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. |
| **List REQUIRED skills, knowledge, and abilities required for this position. As listed in Classification Standards.** | \*Ability to review data for accuracy, completeness, validity, and adherence to established standards; ability to compute and record figures accurately; identify, trace and correct errors; ability to utilize computerized systems and programs.  \*Ability to work independently.  \*Working knowledge of operational and fiscal analysis and techniques.  Ability to implement new technology in day to day business processes.  \*Demonstrated ability to interpret and implement regulations, policies, and procedures.  \* Demonstrated ability to effectively interpret, organize, and present information and ideas in written or presentation form  \*Ability to communicate effectively with others inside and outside the unit, including conveying technical information  Demonstrates the ability to work with a team of colleagues who represent a diversity of work and conflict resolution styles.  \*Ability to work in a fast-paced environment while exercising tact, courtesy, alertness, and good judgement in responding to others  \*Ability to operationalize sustainability concepts (economy, society, environment) into all aspects of performing job duties. |
| **List PREFERRED skills, knowledge, and abilities required for this position.** | \*Knowledge of PeopleSoft Applications  \*Knowledge of banking and automated cashiering software.  \*Advanced Excel skill level  \*General knowledge of governmental financial record-keeping methods |

**SECTION VII. *Background Check, Credit Check, and Sensitive Information:***

1. **Background Check***: A background check must be satisfactorily be completed before a candidate can be offered this position. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for this position. The background check consists of the following: Employment and education verification, reference checks, and checks of the following systems and databases: National Social Security number/Address Locator, Felony/Misdemeanor, National Criminal Database, Federal Criminal, Department of Motor Vehicles, and National Sex Offender Registry.*
2. **Credit Check**: Credit checks will only be performed for new hires or current employees who are voluntarily reassigned or reclassified into a position that requires a credit check. To determine if this position requires a credit check, please consult with Classification & Compensation Services and reference the [CSU Background Check Policy](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy) located at: <https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy>.

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| **Does this position require a credit check?** | ***Yes******No*** |

1. Sensitive Position*:* For current employees who are voluntarily reassigned or reclassified to a sensitive position, a background check is also required. To determine if this position is a sensitive position, please consult with Human Resources and reference the [CSU Background Check Policy](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy) located at: <https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy>, complete Attachment B.

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| **Does this position meet the criteria for a sensitive position?** | ***Yes******No*** |

# SECTION VIII. SIGNATURES

Signature indicates position description is an accurate and correct statement of duties and responsibilities assigned to position.

Employee’s Signature & Date

Supervisor’s or Lead’s Signature & Date

Dean’s or Chief Administrator’s Signature & Date

# Attachment A

Complete for all positions

**To comply with the provisions of the Americans with Disabilities Act, specify the physical, mental, and environmental conditions of the essential functions of the job, please complete the sections below.**

**Physical Summary:** Choose one description out of the categories below that best describes this position.

**Sedentary Work:** Involves mainly sitting. Walking and standing are minimal. Lifting is limited to lightweight objects (10 pounds or less).

**Light Work:** Job involves some lifting of medium weight objects (10-20 pounds) and/or 10% -20% of the job involves standing or walking.

**Medium Work:** Job **i**nvolves lifting heavy-weight objects (20-40 pounds) and/or 20%-40% of the job involves standing, squatting, kneeling, or walking. May require pushing or pulling objects within the weight limits.

**Heavy Work:** Job involves lifting more than 40 pounds. Approximately half of the incumbent’s time will be spent walking, standing, squatting, kneeling, or climbing.

**Use codes below for each of the item(s) which most accurately describes the extent of the specific activity performed in this position.**

“C” = constantly or 6-8 hours per day “F” = frequently or 3-6 hours per day

“O” = occasionally or up to 3 hours per day “N” = never

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| **Physical Requirements of the Position** | | **Mental Requirements of the Position** | |
| O | Bending (neck) | C | Reading & Comprehending |
| O | Bending (waist) | C | Writing |
| N | Climbing | C | Performing Calculations |
| N | Crawling | C | Communicating Orally |
| N | Kneeling | C | Reasoning & Analyzing |
| O | Pushing/Pulling | C | Decision Making |
| C | Sitting |  | Other: |
| N | Squatting |  | Other: |
| F | Standing | **Environmental Working Conditions** | |
| F | Twisting (neck) | O | Exposure to variations in temperature/humidity |
| O | Twisting (waist) | N | Exposure to chemicals, gases, dust or fumes |
| F | Walking | N | Operates machinery or drives motorized equipment |
| F | Handling Objects | N | Exposure to bio-hazards |
| C | Manual dexterity | C | Working in normal office environment |
| O | Reach above/below shoulder | N | Uses specialized equipment |
| N | Using foot controls |  | Other: |
|  | Other: |  | Other: |

# Attachment B

Complete for all positions

***Sensitive Position:*** *For current employees who are voluntarily reassigned or reclassified to a sensitive position, a background check is also required. To determine if this position is a sensitive position, please consult with Human Resources and reference the CSU Background Check Policy located at:* [*https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy*](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy)*.*

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| *Consideration for designation as a sensitive position per HR Technical Letter 2017-17* | | |
| 1. Does this position have responsibility for the care, safety, and security of people (including children and minors), animals, and CSU property? | Yes  No | Sexual offender registry check for those who perform work involving regular or direct contact with minor children and those who are identified as mandated reporters of child abuse and neglect under Executive Order 1083 and California Penal Code §11165.7(a). |
| 1. Does this position have authority to commit financial resources of the university through contracts greater than $10,000 | Yes  No |  |
| 1. Does this position have access to, or control over, cash, checks, credit cards, and/or credit card account information? | Yes  No |  |
| 1. Does this position have responsibility or access/possession of building master or sub-master keys for building access? | Yes  No |  |
| 1. Does this position have access to controlled or hazardous substances? | Yes  No |  |
| 1. Does this position have access to and responsibility for detailed personally identifiable information about students, faculty, staff, or alumni that is protected, personal, or sensitive? | Yes  No |  |
| 1. Does this position have control over campus business processes, either through functional roles or system security access? | Yes  No |  |
| 1. Does this position have responsibilities that require the employee to possess a license, degree, credential or other certification to meet minimum job qualifications and/or to qualify for continued employment in an occupation or position? | Yes  No | **List professional licensing, certification, and/or credential verification required:** |
| 1. Does this position have responsibility for operating commercial vehicles, machinery or equipment that could pose environmental hazards or cause injury, illness, or death? | Yes  No | Motor Vehicle Records/Licensing Check is required |
| **If you answered yes to any of the questions above, this position shall be deemed a sensitive position which may require additional background components.** | | |

# Attachment C

Complete for MPP Positions Only

**Mental Effort:**

Enter frequency of occurrence for all applicable activities using the following key:

“C” = constantly or 6-8 hours per day “F” = frequently or 3-6 hours per day

“O” = occasionally or up to 3 hours per day “N” = never

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| **Planning** | | **Performance Evaluations** | | |
|  | Forecast |  | Determine Performance Standards | |
|  | Set Program Goals |  | Authorize/Approve Awards | |
|  | Determine Budget Allocations |  | Prepare Performance Evaluations | |
|  | Establish, Implement, Revise Policies |  | Observe/Follow-Up daily | |
|  |  |  | Correct Work/Behavior Problems | |
| **Organization** | | **Employee Relations** | | |
|  | Describe Relationships Between Functions |  | Initiate Corrective Action | |
|  | Define Department/Divisional Structure |  | Authorize Formal Discipline | |
|  | Establish Priorities to Meet Goals |  | Administer Collective Bargaining Agreements | |
|  | Schedule Work for Employees |  | Prepares/Investigates Grievance Awards and Complaints | |
|  | Implement procedures |  | Formulates/Represents University Position for Formal Grievances/Complaints | |
|  | Determine work methods |  |  | |
|  | Balance multiple tasks/projects |  |  | |
| **Direction/Leadership/Supervision** | | **Other** | | |
|  | Educate |  |  | |
|  | Delegate |  |  | |
|  | Coordinate |  |  | |
|  | Coach/Train/Develop |  |  | |
|  | Recommend Formal Training |  |  | |
|  | Motivate |  |  | |
|  | Instruct/Demonstrate |  |  | |
|  | Schedule Staff/Readjust Schedule |  |  | |
| **Staffing** | |  |  |
|  | Define Roles |  |  | |
|  | Give Input to Position Descriptions |  |  | |
|  | Determine Selection Criteria |  |  | |
|  | Recruit/Interview/Select |  |  | |
|  | Orient Staff |  |  | |
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