



POSITION DESCRIPTION

Department:	Student Financial Services
Classification Title:	Admin II
Working Title:	Director of Student Financial Services
FLSA Status:	<input type="checkbox"/> Non-Exempt <input checked="" type="checkbox"/> Exempt
Incumbent:	

Position Summary

Under the general direction of the University Controller, the Director of Student Financial Services performs a wide-range of technical, administrative and analytical functions in support of the operations of Student Financial Services (SFS), which encompasses the Student Accounts Office and the University Cashiers Office. The Director provides leadership and management to staff, assists in the development and implementation of policies and procedures while maintaining regulatory compliance and modifies and initiates operational procedures to improve efficiency, meet department objectives, and identifies opportunities for staff development and improvement. This position plays a critical role in planning, development, and implementation of intra/interdepartmental initiatives and maintains liaison activities with other divisions, departments, and college areas to advance cooperative projects and/or programs designed to contribute to campus goals and objectives. In addition, this position manages student communication to ensure that deadlines and important information is sent to students in a timely fashion. The Director evaluates and updates all information communicated on the department web page for accuracy, ease of search topics, and user-friendly reading and understanding.

The Director is responsible for overseeing the day-to-day operations of student financial services including training, evaluating and supervising staff. The Director oversees the receiving and disbursing of University funds and recording financial transactions. This position is responsible for charging, collecting, receipting, and reporting all student fees in accordance with Federal, State, CSU, and University policies. In addition, the Director is responsible for ensuring the proper receipting and safeguarding of payments and deposits made to the University, distribution of payroll and non-payroll reimbursements, student tuition and fee refunds and disbursements, and promoting financial literacy by educating students with respect to their financial activities, including but not limited to; advising students on financial holds and class cancellations actions resulting from non-payment, tuition and fee waiver requests, and student loan advising.

Duties and Responsibilities

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

Essential Job Functions

Daily 90%

1. Provide strategic and operational oversight to the Student Accounts Office and University Cashiers Office. This includes management of staff, ensuring proper segregation of duties for internal control purposes, review of work being performed, working closely with staff to evaluate processes and develop strategic improvements, and provide opportunities for the staff's professional development or cross-functional training. Responsible for performance management of assigned staff.
2. Implement and manage a process to assess tax charges for students receiving non-qualified financial aid.

3. Ensure proper assessment of student account charges, including but not limited to base tuition and fees, housing and dining fees.
4. Establish and maintain proper lines of communication with campus stakeholders to ensure that new service offerings are communicated clearly and timely to properly notify students of the changes.
5. Implement, manage and maintain all new student fees. which include:
 - a. Calculating and tracking fees by cohort and applicable college
 - b. Calculating and implementing fee increases based on applicable consumer price index (CPI)
 - c. Updating the student fees website
 - d. Prepare reports on applicable fees for campus fee committees
 - e. Responsible for collection of all student fees, providing financial literacy and guidance to help students maintain their financial records in good standing, and incorporating a variety of means to collect student fees when necessary, including but not limited to:
 - f. Placing financial holds on student accounts for non-payment
 - g. Managing the class cancellation process to drop students from classes due to non-payment.
 - h. Expending every effort to reduce the number of students affected
 - i. Working with multiple collection agencies to address outstanding debts
 - j. Submitting outstanding debts to the Franchise Tax board for tax offset
6. Implement and maintain a customer service model that enables SFS to handle peak volumes of customers, without exponentially adding full time staff.
7. Incorporate technology and focusing on continuous improvement to ensure best in class service.
8. Build, enhance and maintain relationships with a variety of different offices across campus, including but not limited to Financial Aid, Registrar's Office, Admissions, Housing and Dining, Payment Services and Information Technology Services (ITS) in order to advance cooperative projects and/or programs designed to contribute to campus goals and objectives.
9. Loan management activities include, but are not limited to:
 - a. Ensure students complete all required documentation
 - b. Ensure completion of federal loan exit counseling requirements
 - c. Loan repayment, deferment, consolidation and collection, along with management of the University's agency relationships with the repayment and collection agencies
 - d. Preparing journal entries to properly record federal reporting and loan activity
10. Participate in CSU system-wide activities for policy and procedure development and or interpretation and may present at group trainings, workshops, and meetings and sits on or lead campus committees and project teams.
11. Handle all incoming payments to the university, including payments for scholarships, tuition and fees, parking permits and payments from auxiliaries across campus.
12. Disburse, manage, and audit petty cash boxes utilized by various departments on campus with a focus on reducing the number of cash boxes across campus to reduce risk of theft or misappropriation.
13. Manage the software system that holds all incoming deposit activity and feeds data to the financial system.
14. Maintain a strong understanding of the parking software system, which the University Cashiers Office co-maintains with University Parking.
15. Provide deposit details and activity as necessary to assist with the bank statement reconciliation process.
16. Ensure all movements of cash and checks across campus are handled in accordance with CSU policy.
17. Handle distribution of all paychecks and employee travel reimbursements.

18. Incorporate a culture of continuous improvement into all major business processes to provide first class customer service while reducing cost of operations.
 - a. Continuously adopt new and innovative technologies into payment and deposit business processes to reduce the amount of cash being exchanged on campus while ensuring compliance with PCI (Payment Card Industry) standards.
 - b. Continuously reduce the amount of armored transport deposit pickups required.

Other Job Functions

As Needed 10%

- Perform other job-related duties and special projects as assigned.

Required Education, Experience, and Credentials

Education and Experience: Bachelor's degree in accounting, finance, business, or related field and six (6) years of progressively responsible experience in accounting or closely related area with demonstrated success in the supervision and first line management.

Licenses, Certificates, Credentials: N/A

Required Skills, Knowledge, and Abilities

- Experience with working with complex ERP systems and the ability to understand both functional and technical requirements related to the system aspects of the position.
- Working knowledge of accounting and internal control principles and practices, especially as related to public universities.
- Ability to research and work with tax laws as they relate to the responsibilities of this position.
- Demonstrated ability to use appreciable judgement to interpret, apply, and develop policies and procedures.
- 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.
- 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.
- Excellent communication skills; ability to effectively communicate information in a clear and understandable manner, both verbally and in writing.
- Thorough knowledge of English grammar, spelling and punctuation.
- Demonstrated ability to maintain a high degree of confidentiality.
- Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
- 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.
- Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.

Preferred Skills and Experience

- Certified Public Accountant (CPA) and/or Master's Degree in accounting, finance, or related field.
- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.

- Experience tracking customer service data metrics and using the data to continuously improve business operations.
- Strong understanding of Federal and State rules and regulations as they relate to higher education.
- Previous work experience managing and safeguarding financial aid funds, including analysis and reconciliation.

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.
- 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.
- Must be able to successfully pass a pre-employment background/fingerprint check.
- This position is a "designated position" in the California State University's Conflict of Interest Code. The successful candidate accepting this position is required to file Conflict of Interest forms subject to the regulations of the Fair Political Practices Commission.
- Full-time MPP employees are required to disclose outside employment at time of hire or within 30 days of taking additional outside employment subsequent to time of hire.
- This position classification has been defined as "Exempt" and is not subject to the overtime provisions of the Fair Labor Standards Act (FLSA).

INCUMBENT: I have read this position description and understand its contents.

Justin Vastine

INCUMBENT NAME	SIGNATURE	DATE
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SUPERVISOR: I certify that all statements on this form are complete and accurate.

Marc
Benadiba University Controller

IMMEDIATE SUPERVISOR NAME AND TITLE	SIGNATURE	DATE
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DEPARTMENT HEAD: I certify that all statements on this form are complete and accurate.

Angie Kraetsch Associate VP for Financial Services

DEPARTMENT HEAD NAME AND TITLE	SIGNATURE	DATE
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HUMAN RESOURCES USE ONLY

Employee ID#: _____	REQUEST FOR:	CLASSIFICATION INFORMATION
Position Number: _____	<input type="checkbox"/> Update Review for File	Classification Title: Administrator II
FTE: _____	<input type="checkbox"/> Classification Review	Class Code/Range: 3312
<input type="checkbox"/> Permanent	<input type="checkbox"/> New Position Recruitment	CBID: M80
<input type="checkbox"/> Temporary	<input type="checkbox"/> Replacement Recruitment	MPP Job Code: C-11-4
<input type="checkbox"/> COI Position		Classifier Initials: AT
Recruitment Number: _____		Date: 9/25/2023