Date Revised: 9/9/2024

STAFF Position Description

Instructions: *Complete this form for all staff positions. The form is also used to request a classification review of a currently filled position, or to update a position description with no review requested. After completion of the form, a signed copy should be given to the employee (if the position is filled), one copy forwarded to the Office of Human Resources, and the original electronic version maintained by the department.*
[NOTE: This form is unlocked; you will need to Double-click check boxes in order to check, and Ctrl + Click to open links.]

A. Action Requested

☐ Request a New position OR ☒ Fill a Vacant position *(Must initiate through online recruitment)*
☐ Initiate a Classification Review for a filled position

Requestor: ☐ Employee OR ☐ MPP Administrator	**Name:**

☐ Update an existing position description *(no review requested)*
☐ New Employee/Appointment acknowledgment of the position description *(no review requested)*
(Employee should be given full position description within 7 working days of start date)

B. Current Information

Name of current incumbent: *(if filled)*			**Employee ID #:**
Or if vacant, name of previous incumbent: Laura Santa Cruz			
Classification Title: ASC	**Job Code:** 1035	**Grade:** 2	**Position #:** 99740850
Working Title: *(optional)* Special Operations Coordinator		**FLSA Status:** Non-Exempt *(See CSU FLSA/Job Code List - csun.edu/careers/resources-links)*	
Department ID: 10195	**Department Name:** Financial Aid & Scholarships		**Time Base:** 1.0

Lead *(non-MPP Reports To, if applicable)* **Name:**	**Classification Title:**	**Working Title:**
MPP Administrator/Department Chair *(Reports To)* **Name:** Jasmine Mencias	**Working Title:** Associate Director, Operations	

*Please attach an org chart, if requesting a reorganization (current and proposed) (See **Campus Org Chart** - csun.edu/hr/orgchart)*

Is this a sensitive position as designated by the CSU? ☒ Yes ☐ No *(See **Sensitive Table** - csun.edu/hr/background-checks)*

C. Position Purpose *(Hint: Complete Section D. first and then summarize; typically between 2 to 5 sentences)*

Please briefly describe the primary function, nature, and scope of the position.

Under general supervision of the Associate Director of Financial Aid Operations, the Special Operations Coordinator is responsible for managing and coordinating all incoming documents to ensure the accurate review and processing of documents. The incumbent will act as an informational resource to staff on issues and questions related to OnBase workflow, verification and the interpretation of tax documents; participate as a member of the annual document committee; and update verification documents, procedures and the department website. This position is responsible for generating reports from OnBase and will work with the Systems Team to test and implement the OnBase document process for the upcoming year. The position provides input to the Leadership Team for enhancement of the OnBase Workflow process in order to serve students and parents more effectively.

D. Major Duties

Describe each major set of responsibilities assigned to this position (typically 4 to 7) listing them in order of importance. Indicate the approximate percentage (minimum of 5% for a given major duty, with the total equaling 100%) of time spent in each area of responsibility, estimated over a year timeframe. Miscellaneous or other duties as assigned should be 5%.

*Indicate duties, which are "**essential functions**" by checking the Essential box in the right column (15% or greater to be considered essential).*

*The Americans with Disabilities Act (ADA) provides that there shall not be a barrier to employment for an otherwise qualified disabled individual who is able to perform the "**essential functions**", which is intrinsic to the work. **A function may be essential because 1)** the position was established to perform the function; **2)** a limited number of employees are available to perform the function; and/or **3)** removing the function would fundamentally change the position. (Example: A receptionist must be able to respond to in-person, telephone and electronic inquiries).*

Description of Duties	**% of Time Total = 100**	**Essential (Minimum 15%)**

Document Management: - Ensure accurate review, batching, scanning, and indexing of all incoming documents - Manage and control assigned OnBase workflow queues and generate necessary reports - Coordinate the processing and workflow of Satisfactory Academic Progress appeal documents - Successfully implement and lead the FA1 Document Review Status queues to facilitate verification and document workflow in accordance with office policy - Make appropriate decisions regarding the development of documents that are in compliance with aid program regulations, and, when appropriate, consult with the department directors on matters with broader implications that can/should be dealt with independently **Procedure Development:** - Collaborate with the Customer Service Lead to update document intake procedures - Work closely with the Leadership Team to update the online verification guide, verification documents, verification procedures, and department website - Make recommendations to Leadership on improving document flow, verification processes, and student communications **Verifications and Corrections:** - Complete verification and necessary corrections on aid applications, including degree corrections - Act as an informational resource for staff on issues related to OnBase verification workflow and the interpretation of tax documents **Support:** - Make recommendations to Leadership on suggested improvements for document flow, verification process, and student communications - Provide reports to the Associate Director as needed - Serve as a backup for the Customer Service unit - Work on special projects and other duties as assigned - Carry out a variety of complex assignments without detailed instructions	75	☒
Systems Support/Document Imaging Support -Works with the Systems Team and the Document Imaging Specialist to revise, test, and implement the online document process and OnBase document workflow for the upcoming year. Review messages attached to financial aid document checklists.	15	☐
Professional Development - Attends departmental meetings. Keep up with professional reading, research technology solutions, and attend conferences, and on/off-campus workshops.	5	☐
Performs other Duties as assigned.	5	☐
		☐
		☐
		☐
		☐
		☐

E. Physical and Cognitive Demands; and Environmental Conditions

Check the appropriate box for each of the following items that most accurately describes the minimum extent of the specific activity performed by this position. Based on a typical workweek.

PHYSICAL DEMANDS	Greater than 50%	Less than 50%	N/A		Greater than 50%	Less than 50%	N/A
1. Key Boarding and Mousing	☒	☐	☐	12. Lifting or Carrying			
2. Repetitive Motion of upper extremities	☒	☐	☐	A. Up to10 lbs.	☒	☐	☐
3. Hearing	☒	☐	☐	B. Up to 25 lbs.	☐	☒	☐
4. Sight	☒	☐	☐	C. Up to 50 lbs.	☐	☐	☒
5. Sitting	☒	☐	☐	D. Over 50 lbs.	☐	☐	☒
6. Standing	☒	☐	☐	13. Pushing or Pulling			
7. Walking	☒	☒	☐	A. Up to10 lbs.	☐	☒	☐
8. Bending (from waist or neck)	☐	☒	☐	B. Up to 25 lbs.	☐	☒	☐
9. Climbing Ladders		☒		C. Up to 50 lbs.	☐	☐	☒
10. Stooping, Kneeling, or Squatting		☒		D. Over 50 lbs.	☐	☐	☒
11. Reaching above shoulder level	☐	☒	☐				

☐ ☐

ENVIRONMENTAL CONDITIONS	Greater than 50%	Less than 50%	N/A
1. Inside (Typical office environment)	☒	☐	☐
2. Elevated Work *(Raised platform/scaffold)*	☐	☐	☒
3. Extreme Temperature (hot or cold)	☐	☐	☒
4. Outdoor	☐	☒	☐
5. Hazards	☐	☐	☒

OTHER *Describe any additional demands/conditions or special circumstances that are pertinent to the position.*

n/a

F. Equipment

List any special software and machines, tools, and equipment used on a regular basis.

Type	Purpose and Desired Results
Example A1) Lawn Mower *Example B1) Microsoft Word*	*Example A2) Mowing grass* *Example B2) Create or update documents*
Working knowledge of data processing systems; mainframe and LAN environments; and PC-based operation	Financial Aid and Scholarship processing and management
Oracle's PeopleSoft (SOLAR), Excel, Word, OnBase Imaging, Blackbaud	Financial Aid and Scholarship processing and management

G. Training and/or Licenses; and Additional Knowledge, Skills, Experience

(A). Training and/or Licenses: *List required and preferred training, licenses or certifications. If a license is required for any position outside of the CSU Professional License Table (www.calstate.edu/hrpims/pims/appendix/professional_license_table.htm), a justification must be provided in description. *Any CSU/CSUN "Required" training will be provided after starting the appointment.*

	Required	Preferred	N/A
*CSU Sexual Harassment Prevention / Title IX / Data Security Training *(Required for ALL employees)*	☒		
*CSUN Defensive Driver Training and Powered Cart/Low Speed Vehicle Safety Training (if appl)	☐	☐	☒
*CSUN Procurement Card (P-Card) Training	☐	☐	☒
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

(B). Additional Knowledge, Skills, and Experience: *List additional knowledge, skills, and experience. Human Resources will determine the minimum qualifications based on the CSU Classification Standards.*

H. Lead or Oversight of Other Positions ☐ Yes ☒ No (Please list below)

List positions (including Student Assistants) that incumbent will lead, oversee or provide direct or general work direction, if applicable. (Generally, non-MPP Staff may lead, oversee, coordinate, and provide input for hiring and evaluations to MPP Administrators. Management and supervision authority is held at the MPP Administrator level.):

Name *(if applicable)*	Job Title	Position #

I. Changes in Position

If this is an existing position that you believe has changed, what specific duties or responsibilities have been changed, added to, or removed since the position was reviewed previously or since the incumbent was assigned?

J. Signatures *(Print, sign and date below)*

EMPLOYEE *(Acknowledgement of reading and receiving a copy of this job description)*

Employee:	**Signature:**	**Date:**	**Extension:**

LEADS / MPP ADMINISTRATORS *(Acknowledgement that the information is accurate)*

Non-MPP Lead *(if applicable)*:	**Signature:**	**Date:**	**Extension:**
1st level MPP Administrator/Dept. Chair *(required)*: Jasmine Mencias	**Signature:**	**Date:**	**Extension:** 3827
2nd level MPP Administrator *(if applicable)*: Shelline Warren	**Signature:**	**Date:**	**Extension:**
3rd level MPP Administrator *(if applicable)*:	**Signature:**	**Date:**	**Extension:**