## Job Family Matrix

<table>
<thead>
<tr>
<th>Job Function: Finance</th>
<th>Job Family: Student Financial Services - Professional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Family Summary: Perform or manage student financial information into and out of Student Information Systems (SIS) at a school or university-wide, while ensuring compliance.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Title: Student Financial Services Administrator III</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Code: F1657P</td>
</tr>
<tr>
<td>Grade Level: 57</td>
</tr>
<tr>
<td>Effective/Revision Date: January 2017</td>
</tr>
</tbody>
</table>

### Job Summary

Administer operational activities related to Student Information Systems (SIS).

### Core Duties

- Evaluate SIS workflows and processes, recommend improvements
- Work collaboratively with all areas throughout the University that send and receive student financial data
- Monitor service levels, address areas of concern
- Manage ongoing relationships with external vendors to ensure the organization receives satisfactory standards of service
- Create and maintain SIS training materials; act as a resource to school/unit staff
- Develop and distribute communications to internal and external constituencies
- May provide training to clients and staff
- May be responsible for electronic billing and federally mandated tax reporting
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations with focus on those pertaining to student financial services
## Basic Qualifications
- Bachelor's degree or equivalent work experience required
- Minimum of 5 years’ relevant work experience

## Additional Qualifications and Skills
- Knowledge of Microsoft Office Suite, intermediate excel skills
- Knowledge of basic financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool

## Certificates and Licenses

## Physical Requirements

## Working Conditions
- Work is performed in an office setting
# Job Family Matrix

**Job Function:** Finance  
**Job Family:** Student Financial Services - Management

**Job Family Summary:** Perform or manage student financial information into and out of Student Information Systems (SIS) at a school or university-wide, while ensuring compliance.

<table>
<thead>
<tr>
<th>Job Title: Student Financial Mgt II</th>
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<th>Job Title: Student Financial Services Mgt IV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Level: 56</td>
<td>Grade Level: 57</td>
<td>Grade Level: 58</td>
</tr>
<tr>
<td>Exemption: Exempt</td>
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<td>Exemption: Exempt</td>
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<tr>
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**Job Summary**

- Supervise staff and ensure compliance with student loan program regulations and departmental policies.
- Manage operational activities related to Student Information Systems (SIS).
- Manage all student financial information for Student Information Systems (SIS).

**Core Duties**

- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment.
- Assist in developing departmental financial policies and procedures.
- Oversee loan system and general ledger balances.
- Participate in budget preparation and review.
- Collaborate with the department's leadership and managers on student financial operations.
- Assist in developing communication related to collections and loans.
- Ensure financial compliance with University policies and procedures, and applicable legal rules and regulations with focus on those pertaining to student financial services.

- Evaluate SIS workflows and processes, recommend improvements.
- Work collaboratively with all areas throughout the University that send and receive student financial data.
- Monitor service levels, address areas of concern.
- Manage ongoing relationships with external vendors to ensure the organization receives satisfactory standards of service.
- Create and maintain SIS training materials; act as a resource to school/unit staff.
- Develop and distribute communications to internal and external constituencies.
- May be responsible for electronic billing and federally mandated tax reporting.
- Ensure financial compliance with University policies and procedures, and applicable legal rules and regulations with focus on those pertaining to student financial services.

- Provide direction and guidance to staff and customers in such areas as: loans, customer service, financial systems, and collections.
- Analyze metrics and identify opportunities to streamline processes; develop and implement action plans for improved procedures.
- Collaborate on the development of new SIS procedures within school/unit that support university-wide policies and initiatives.
- May be responsible for electronic billing and federally mandated tax reporting.
- Select and manage ongoing relationships with external vendors to ensure the organization receives satisfactory standards of service.
- Participate in planning for systems and policies including such activities as new system implementations and effective operationalization of new University/school policies.
- Ensure financial compliance with University policies and procedures, and applicable legal rules and regulations with focus on those pertaining to student financial services.
### Basic Qualifications
- Bachelor's degree or equivalent work experience required
- Minimum of 3 years’ relevant work experience
- Bachelor's degree or equivalent work experience required
- Minimum of 5 years’ relevant work experience
- Bachelor's degree or equivalent work experience required
- Minimum of 7 years’ relevant work experience
- Supervisory Experience

### Additional Qualifications and Skills
- Knowledge of Microsoft Office Suite, intermediate excel skills
- Knowledge of basic financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool
- Supervisory Experience
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool
- Supervisory Experience
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial principles
- Knowledge of SIS
- Demonstrated experience with Financial systems and data query tool

### Certificates and Licenses

### Physical Requirements
- Work is performed in an office setting
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### Working Conditions

### Certificates and Licenses
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Job Code:</strong></td>
<td>F1659M</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Grade Level:</strong></td>
<td>59</td>
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<tr>
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### Job Summary

Responsible for the overall direction and oversight of student financial operations and systems. Develop and implement student financial policies.

### Core Duties

- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Manage the operations of student loans and collections, cash receipts and student billing
- Manage the annual audit process
- Monitor support systems and business processes; develops and enhances new and enhanced processes
- Collaborate with university-wide leadership to continuously approve processes, policies and procedures
- Serve as a key resource for student financial policies, may provide training to clients and staff
- Develop policies needed to ensure the University has complete, accurate student financial records
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations
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<td><strong>Basic Qualifications</strong></td>
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<td>• Bachelor's degree or equivalent work experience required</td>
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<td>• Minimum of 8 years' relevant work experience</td>
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<td>• Supervisory experience</td>
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<td>• Work is performed in an office setting</td>
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<tr>
<td>• Frequent travel to other sites across the University is required</td>
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