FINANCIAL AID SYSTEMS SPECIALIST

DEFINITION

Under direction, performs complex technical support duties pertaining to the development and use of enterprise computer system modules such as those serving financial aid and admissions/records functions; serves as an advanced module user and the primary liaison with Information Technology staff regarding the automation of assigned departmental functions and the resolution of module problems; and performs related work as assigned.

DISTINGUISHING CHARACTERISTICS

This is a specialized technical and administrative class within the Yosemite Community College District (YCCD). Incumbents in this class work in either the Financial Aid or Admissions and Records Offices, performing duties as advanced users and system liaisons for specific modules within the District-wide computer Enterprise Resource Program (ERP). Incumbents use and apply advanced knowledge of the business functions within their assigned department to assist Information Technology staff in developing, coordinating, and implementing automated departmental processes. Incumbents also serve as the departmental contact and provide support for system modifications, upgrades, maintenance, tests and repairs.

This class may be distinguished from the other departmental and administrative specialist classes by its focus on departmental technology system support. This class may also be distinguished from the District's Information Systems classes because incumbents in this class are advanced system users rather than technology experts, and the requirements for this class emphasize knowledge of departmental operations rather than a background in computer technology.

SUPERVISION RECEIVED AND EXERCISED

Incumbents in this class work under the direction of a manager or senior manager, receiving occasional supervision while working toward a definite objective that requires use of a wide range of procedures. Incumbents plan and/or determine specific procedures or equipment required to meet assigned objectives and solve non-routine problems, referring only unusual matters to a supervisor.

An incumbent in this class does not directly lead or supervise other full-time employees, but may assign, direct and/or monitor the work of subordinate full time, part time, and/or student employees on a project or assignment basis.

EXAMPLES OF DUTIES (*Illustrative Only*)

- Maintains a library of queries and other tools; develops new sophisticated queries to provide required data and information; develops processes and procedures to download/upload data reducing manual data entry requirements; uses queries to verify the accuracy of databases.
- Within an assigned department, facilitates the development and use of one or more specific ERP system modules; functions as the primary liaison with Information Technology (IT) staff regarding

departmental use of the assigned module(s); provides advanced user support to IT related to system modifications, upgrades, maintenance, tests and repairs.

- Works with departmental management and staff to develop and document business functions and processes; evaluates workflow issues and output needs; communicates with IT staff to identify automation opportunities and/or initiate desired system modifications; identifies and communicates desired system parameters and rules; provides business communications and other process documents for automation and system integration.
- In conjunction with IT staff, recommends, tests and implements system patches and modifications; ensures that patches/modifications do not alter or damage existing processes/data; identifies system gaps; evaluates and reports tests results; documents system issues and resolutions.
- Plans and coordinates departmental activities related to comprehensive data updates and system upgrades; assists IT staff with developing and implementing new programs and methods for departmental process automation.
- Troubleshoots system and data problems; performs routine technical system adjustments and repairs to resolve problems; communicates with IT staff as needed to correct complex issues.
- Develops and prepares system operation procedure manuals; maintains and updates manuals as needed to reflect system changes.
- Designs and runs complex system reports for both business operation needs and to monitor system functions; performs database queries; reviews error lists makes data corrections; works with IT staff to develop standardized reports based on department needs.
- Serves as a technical resource to other departments regarding the assigned system module(s); may assist other staff who have access to module information with technical system questions or problems.
- May input and/or modify data in restricted access areas of the module(s).
- Provides technology support to staff to assist them in making more effective use of financial aid software applications and databases; provides short cuts and other tools; conducts one-on-one training and guidance to aid staff in carrying out assignments efficiently through the use of technology tools.
- May perform advanced and specialized technical administrative duties pertaining to the business operations of the assigned department.
- Oversees the comparison of financial need with available financial aid and personally adjudicates the more complex financial aid and student account issues; coordinates with other departments including EOP&S and CalWORKs on student financial aid awards.
- Performs technical administrative duties; Packages financial aid based on specific program eligibility and total award amount attends meetings; serves on committees and task forces; independently responds to various inquiries and correspondence; prepares information and data requested for administrative review; prepares reports, files, correspondence and other documents.
- Performs other related duties as assigned.

TYPICAL WORKING CONDITIONS

- Work is typically performed in a standard office environment and requires substantial exposure to computer screens.

MINIMUM QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The knowledge and ability requirements are representative of essential duties. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions of the position.

Knowledge of:
- Standard business computer applications and software.
- Advanced and specialized business operations and computerization needs of the work unit to which the position is assigned.
- Advanced office principles, practices and methods.
- Principles and practices of leadership and supervision.
- Principles and practices of project management.

Ability to:
- Initiate and help coordinate complex, computer system projects.
- Communicate with technical and non-technical users.
- Prioritize work while maintaining a high level of customer service.
- Perform a variety of technical systems analyses and tests.
- Utilize organizational skills and initiative to improve processes.
- Implement strong project time management skills.
- Provide a working knowledge of design, development and implementation of an integrated management information system, system applications and limitations, and other related areas.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of the work.

Licenses and Certificates:
- Depending upon assignment, a valid license to drive in California may be required.

Physical and Mental Standards:
- **Mobility:** ability to sit for long periods, move about an office, stand occasionally, reach above and below desk level.
- **Dexterity:** fine manipulation sufficient to operate a computer keyboard, handle individual papers, write and take notes.
- **Lifting**: occasional lifting of papers, files, equipment and material weighing up to 15 pounds.
- **Visual Requirements**: close vision sufficient to read files, documents, and computer screens and do close-up work; ability to adjust focus frequently.
- **Hearing/Talking**: ability to hear normal speech, speak and hear on the telephone, and speak in person.
- **Emotional/Psychological Factors**: ability to make decisions and concentrate; frequent contact with others including some public contact; frequent deadlines and time-limited assignments.

Education and Experience:
Any combination of education, experience and/or training that would likely provide the above-required knowledge, skills and abilities is qualifying. Typical background patterns that would provide the knowledge, skills and abilities are:

<u>Pattern I</u>

- <u>Experience:</u> One-year equivalent to either an Admissions and Records Specialist or a Financial Aid Specialist (depending upon area of assignment) at YCCD.

<u>OR Pattern II</u>

- <u>Education:</u> Possession of an associate's degree from an accredited college or university, with course work in business administration or a closely related field.
- <u>Experience:</u> Depending upon the assignment of the position, five years performing specialized technical work in either college admissions and records or financial aid services, that included some participation in all technical areas of the department and required advanced use of a complex data management system.

Special Requirements:
- The specific nature of the above-required experience will vary depending upon the assignment of the position.

Class Adopted: 03/01/09
Class Amended: 7/1/2021