Financial Support Specialist

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<th>Job Family:</th>
<th>Sub Family:</th>
<th>Career Track and Level:</th>
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<tr>
<td>Finance and Business</td>
<td>Financial Support</td>
<td>TAS 3</td>
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<th>Job Code:</th>
<th>Job Series: 27213</th>
<th>FLSA Category: NON-EXEMPT</th>
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<td>Pay Grade: CA&amp;P</td>
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Job Family

**Finance and Business:** Provides the University with critical information regarding the University’s operational, financial, and academic performance. Manages and ensures the financial compliance of the University’s finances. Prepares University budgets. Assists leadership in strategic planning. Prepares required reports for external parties.

Sub Family

**Financial Support:** Provides front-line support to customers for the finance department. Researches, interprets, analyzes, and translates information in different formats to accommodate a variety of customer needs. Creates customer reports for finance managers.

Job Responsibilities

- Guides and assists customers with highly complex questions, paperwork, and requirements, as they relate to financial and business activities such as billing, financial aid, payment deadlines, tuition rates, tax forms, refunds, or student receivables. Advises lower level employees on complex customer inquiries, requiring advanced knowledge of department policies.
- Often directs work, trains, and/or supervises student employees.
- Ensures requisitions are processed in a timely manner and are properly recorded. Obtains necessary documentation for customers related to contracts.
- Provides complex financial support to departments and areas within the University.
- Ensures financial aid applications are received and processed correctly. Researches and resolves any issues with applications.
- Processes financial aid award adjustments and determines loan eligibility and award amounts. Communicates with students regarding student loan issues, eligibility requirements, and award amounts.
- Posts and removes charges on accounts as necessary. Places holds on student accounts for delinquent loans and payments. Prepares and distributes invoices and all other account documentation. Reviews work of other employees.
- Compiles, analyzes, and reconciles accounts related to loan and grant programs to ensure compliance with state and federal regulations.
- Processes payroll. Completes necessary forms, prepares payroll reports, and processes payroll correction requests.
- Records and tracks expenses and revenue for department or area.
Role

- Fully proficient in applying established standards for the job.
- Applies advanced technical or process knowledge; requires ability to utilize diverse but conventional methods, techniques, or approaches to meet specific needs of an assignment.
- May supervise or oversee the work of other TAS and/or student employees.

Impact and Complexity

- Performs job responsibilities through use of specialized tools, job experience, and established standards. Often organizes, sets priorities, schedules, and reviews work of student workers or volunteers. Prioritizes, plans, and organizes own work within time, process, and results requirements; determines processes and sequences to follow based on needs and urgency required by the circumstances.
- Uses experience and expertise to anticipate department/discipline’s needs, and handles the situation or identifies appropriate resource. Problems and issues faced are complex and occasionally ill-defined and may need some analysis to understand. Demonstrates sound judgment and decision making in situations requiring assessment interpretation and analysis.

Requirements

Knowledge of standard finance and business practices, policies, procedures, tools, and/or equipment in a field of specialization typically obtained by a high school degree or GED or equivalent and a minimum of 3 years of related experience. An equivalent combination of education, training, and experience is acceptable. Specific knowledge, certifications, and licensure will apply at the position level.

This job specification describes the general nature and level of work being performed by people assigned to this classification. Employees may perform some or all of these duties. Examples listed do not preclude the performance of other duties similar in nature or in level of complexity.