

## Position Description

		Today's Date
Assistant Director of Financial Aid Systems		11/20/2024
Appointment (9mos. / 12 mos. / Other)	FLSA	
12 months	Exempt	
Position Type	Work Location	
Unclassified	WOU	
Department/Division	Position Number	
Financial Aid	E99651	
Reports to	Reports to Position Number	
Director	E99737	

### SUMMARY

A brief summary of the position here.

The Assistant Director of Financial Aid Systems has the responsibility to provide database administration and support to the Financial Aid Office. That support includes data analysis, maintenance, development, programming, file transfers, procedures, and reporting; end user training within software applications; product analysis; software and data troubleshooting. Reviews, tests, and assists with documentation and training of relevant components of the Ellucian Higher Education Banner integrated management database. Updates and maintains Banner for yearly processing and maintains communication processes. Assists with Ellucian CampusLogic product updates. Additionally, the Financial Aid Assistant Director provides leadership and supervision, oversees the Administrative Program Assistant position, and provides back-up support for office coverage. Assists in developing and maintaining office functions, processes, and procedures. This position also provides advisory services to the Director of Financial Aid in the planning and design of current and future data analysis needs.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

This description covers the most significant essential and auxiliary duties performed by this position for illustration purposes, and does not include other work, which may be similar, related to, or a logical assignment for the position. The job description does NOT constitute an employment agreement between the university and employee and is subject to change by the university as the organizational needs and requirements of the job change.

### JOB DUTIES

**JOB DUTIES** (Please ensure the total of "% of Time" equals 100%)

% of Time	Duties / Responsibilities	Essential or Incidental
60%	<u>Banner System Analysis, Maintenance, and Reporting</u> 1. <u>Database Analysis:</u> Responsible for the software upgrades and throughout the academic year. Researches the annual and ongoing changes to ensure compliance with the upgrades. Updates and works with users after each new implementation to ensure the users are aware of the new updates and how to use them. 2. <u>Systems Analysis:</u> Works closely with University Computing Solutions (UCS), Ellucian, and CampusLogic, and with end users to keep the system functional and performing at	Essential

	<p>its peak. Troubleshooting problems that arise and changing processing flow to meet those needs.</p> <p>3. <u>Data Administration and Support:</u> Monitors, maintains, and supports the entire financial aid system.</p> <p>4. <u>Processing and Reporting:</u> Processes, analyzes, maintains, and updates financial aid student records. Creates and runs various reports required by the financial aid office as well as other offices on campus upon request.</p> <p>5. <u>Communication:</u> Creates, maintains and processes electronic and paper communication to students on a weekly basis through the awarding and disbursement process and as needed throughout the year. Also, responsible for the annual system communication updates.</p> <p>6. <u>Product Maintenance and Analysis:</u> Monitors new Financial Aid releases from Ellucian and coordinates the updates with UCS. Reviews and recommends new features and resolves functionality issues. Research Banner FA defects and enhancements. Collaborates with UCS for system upgrade testing protocols.</p> <p>7. <u>Product Security:</u> Primary security officer for CampusLogic products and provides back-up security for Banner FA.</p>	
30%	<p><u>General Work Duties</u></p> <ol style="list-style-type: none"> <li>1. Provides support for the processing of Return to Title IV calculations.</li> <li>2. Responsible for the annual satisfactory academic progress (SAP) project performed at the end of every academic year (spring term) and at the end of each term for those students in bad SAP and those on financial aid probation or financial aid action plan.</li> <li>3. Responsible for term-based processes (i.e., census process and transfer monitoring)</li> <li>4. Maintains the College Cost Meter system and Net Price Calculator</li> <li>5. Assists the financial aid office staff with systems questions, training staff on processes, and fixing processing issues that arise with a student's file.</li> </ol>	Essential
5%	<p>Provides back-up support for loading ISIR records and for Banner disbursement and reporting</p> <ol style="list-style-type: none"> <li>1. Responsible for dataload, tracking, budgeting, and packaging of aid for student records that are ready to be processed</li> <li>2. Runs originations and disbursement records and submits data to the Common Origination and Disbursement (COD) system.</li> <li>3. Emails students when their aid is disbursed and emails other correspondence regarding awarding, exit counseling, etc.</li> <li>4. For the terms where the initial disbursement of aid occurs before academic standing has been determined, code in Banner those students who are on academic probation for the previous term to prevent disbursement of aid.</li> </ol>	Essential
5%	<p><u>Leadership and Human Resources Management</u></p> <ol style="list-style-type: none"> <li>1. Member of the financial aid management team that helps support the direction of the office, provides input, and reports to the Director of Financial Aid. This position supports the delivery and accountability for federal, state, institutional, and private financial aid funds to undergraduate and graduate students.</li> </ol>	Essential

	2. Guide, train and serve as a resource to the financial aid counselors and classified team for system questions and guidance. 3. Prepares performance appraisal for the Classified Technical Records Specialist position. Helps develop and update the position description, takes disciplinary actions as needed or responds to staff grievances, counsel's employee regarding performance deficiencies, reviews and approves/disapproves classified employee leave requests, monitors workflow with the director and adjusts staff assignments when necessary to maintain smooth performance in all areas.	
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## QUALIFICATIONS

Ability to perform essential job duties with or without reasonable accommodation and without posing a direct threat to the safety or health of employees or others. To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

**Applicants in this position must not be in default on any federal student loans.**

**This position works with extremely confidential and sensitive material and must at all times be cognizant of the FERPA regulations, the Higher Education Act, and the Privacy Act in releasing any information in a student's file.**

**This is an essential position that may require work to occur before or after regular office hours.**

## Required Knowledge and Skills

List the major areas of knowledge and skills that are **required** to perform the duties of this position.

- Knowledge of desktop applications, such as Ellucian Banner FA and Ellucian CampusLogic
- Knowledge and ability to read technical manuals and translate information into meaningful information and applicability for non-technical staff.
- Knowledge of integrated database systems
- Ability to train end-users in new software or procedures
- Ability to prioritize and plan work in order to perform in a high output work environment
- Ability to work harmoniously with others and to communicate appropriately and effectively, both orally and in writing, with students, parents, and staff.
- Ability to maintain a high level of ethical behavior and confidentiality of information about students and staff.

## Preferred Qualifications

- Education in a technical field (accounting, information technology, project mgt or closely related field)
- Working knowledge of PL/SQL Developer and HTML
- Experience with document imaging systems management

## EDUCATION and/or EXPERIENCE

Any combination of experience and training that would provide the required knowledge and abilities is appropriate. A representative way to obtain the required knowledge and abilities would be:

Education			
Type of Education	Required	Preferred	Specific field, training or degree
High School Diploma or equivalent (GED)	<input type="checkbox"/>	<input type="checkbox"/>	
Associate degree (A.S., A.A.) or two- year	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.

technical certificate			
Bachelor's degree	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Preferred: technical field (accounting, information technology, project mgt or closely related field)
Master's degree	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
Doctoral degree or equivalent (Ph.D., J.D., Ed.D.)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
Other (explain)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.

Experience			Type of Experience
Years of Experience	Required	Preferred	
<input type="checkbox"/> No experience			
1-2 years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bachelor's degree with Banner FA experience
3-5 years	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bachelor's degree or 5 years of supervisory experience in the awarding of federal financial aid using Ellucian Banner FA system
6-8 years	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
9-10 years	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
10+ years	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.

CERTIFICATES, LICENSES, REGISTRATIONS		
(Select all that apply)	Required	Preferred
<input checked="" type="checkbox"/> None		
Driver's license	<input type="checkbox"/>	<input type="checkbox"/>
Eligibility for Professional license, registration, or certification	<input type="checkbox"/>	<input type="checkbox"/>
Professional license	<input type="checkbox"/>	<input type="checkbox"/>
Registration	<input type="checkbox"/>	<input type="checkbox"/>
Certification	<input type="checkbox"/>	<input type="checkbox"/>
Please specify required professional license(s), registration(s), and or certification(s), if applicable:		
Click or tap here to enter text.		

SUPERVISION		
<b>The practice of oversight given to others. Supervision typically includes directing work activities, counseling, disciplinary actions, hiring, firing, salary actions, performance appraisal, training, etc.</b>		
Level 1	Positions at this level are not responsible for any supervisory functions or responsibilities but may occasionally be asked to orient and/or train new employees.	<input type="checkbox"/>
Level 2	<b>Lead Capacity:</b> Positions at this level are responsible for providing leadership and instruction in daily work or special project direction that is provided to personnel in similar job functions at comparable or subordinate levels. This work is limited to individuals in same work unit. Positions are not responsible for hiring, firing, disciplinary actions, etc.*	<input type="checkbox"/>
Level 3	Positions at this level are normally responsible for some supervisory responsibilities, including providing daily work direction, making recommendations regarding hiring, disciplining, terminating employees, making pay adjustments, and/or making employee job/assignment changes. These jobs do not make independent employment related decisions.	<input checked="" type="checkbox"/>
Level 4	Positions at this level are normally responsible for a full range of supervisory responsibilities, including providing daily work direction, hire, discipline and terminate employees, make pay adjustments, communicate performance appraisals, approve absences, and/or make	<input type="checkbox"/>

	employee job/assignment changes subject to Department Head approval. This is the first full level of supervisory responsibility. Jobs at this level and higher are typically exempt.	
Level 5	Positions at this level are normally responsible for a full range of supervisory responsibilities, including providing daily work direction, authority to hire, discipline and terminate employees, make pay adjustments, communicate performance appraisals, approve absences, and/or make employee job/assignment changes. Supervision will typically include both exempt and nonexempt positions which may include other supervisors.	<input type="checkbox"/>
Level 6	Positions at this level are normally responsible for full managerial responsibility including providing direction to other supervisors/managers regarding the supervision of their staff. Supervisory span will include direct and indirect reports, may cover multiple departments.	<input type="checkbox"/>
Level 7	The positions at this level are normally responsible for the overall management of the college, including providing direction to senior managers regarding the supervision of their staff. Final managerial authority and responsibility rests at this level.	<input type="checkbox"/>
If supervisor position, please list direct reports to employee:		
<u>Employee(s)</u>		<u>Job Title</u>
Gregg Vineyard		Technical Records Specialist

\*A **lead role** typically will provide oversight of people, projects, or functions. Whereas a supervisor will hire, fire and have performance appraisal responsibilities. A lead may contribute to these processes but typically does not have final decision-making authority in employment decisions.

## DECISION MAKING & FISCAL RESPONSIBILITY

For full definitions of terms in the drop down lists please see the PD user guides.

Scope of Decisions Made:	Choose an item.
Impact of Decision Made:	Choose an item.
Autonomy and Discretion:	Choose an item.
Fiscal Authority:	Choose an item.
Fiscal Responsibilities:	Choose an item.
Operating Budget (\$):	\$ Click or tap here to enter text.
Grant funding (\$):	\$ Click or tap here to enter text.
Number of Grants:	Click or tap here to enter text.
Foundation Funding (\$):	\$ Click or tap here to enter text.
Number of Foundation Funds:	Click or tap here to enter text.
Agency Funding (\$):	\$ Click or tap here to enter text.

## WORKING CONDITIONS

**Typical Work Functions\***  
(check all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Balancing                      | <input type="checkbox"/> Carrying                            |
| <input type="checkbox"/> Climbing                       | <input type="checkbox"/> Crawling                            |
| <input type="checkbox"/> Crouching/ Stooping            | <input type="checkbox"/> Driving                             |
| <input type="checkbox"/> Feeling/Handling               | <input checked="" type="checkbox"/> Keyboarding/Computer Use |
| <input type="checkbox"/> Personal Protective Equipment  | <input type="checkbox"/> Pulling/Pushing                     |
| <input type="checkbox"/> Reaching                       | <input type="checkbox"/> Regular interaction with customers  |
| <input checked="" type="checkbox"/> Repetitive movement | <input checked="" type="checkbox"/> Sitting                  |
| <input checked="" type="checkbox"/> Speaking            | <input checked="" type="checkbox"/> Specific Work Schedule   |
| <input type="checkbox"/> Squatting                      | <input type="checkbox"/> Standing                            |
| <input checked="" type="checkbox"/> Telephone Use       | <input type="checkbox"/> Twisting/Bending                    |
| <input type="checkbox"/> Walking/Running                | <input checked="" type="checkbox"/> Writing                  |

☒ Normal office environment

☐ Animals/Wildlife

<b>Typical Working Environment and Hazards*</b> (check all that apply)	<input type="checkbox"/> Chemicals	<input type="checkbox"/> Confined Spaces
	<input type="checkbox"/> Darkness/Poor Lighting	<input type="checkbox"/> Dust/Fumes
	<input type="checkbox"/> Electrical Hazards	<input type="checkbox"/> Explosives
	<input type="checkbox"/> Fire Hazards	<input type="checkbox"/> Heights
	<input type="checkbox"/> Human-Source Material (e.g., blood)	<input type="checkbox"/> Indoor Temp Extremes (Heat/Cold)
	<input type="checkbox"/> Moving machinery/Heavy Equipment	<input type="checkbox"/> Near-Continuous Use of Video Display
	<input type="checkbox"/> Noise	<input type="checkbox"/> Pathogens
	<input type="checkbox"/> Potential Combative Work Environment	<input type="checkbox"/> Radiation
	<input type="checkbox"/> Traffic	<input type="checkbox"/> Vibration
	<input type="checkbox"/> Weather Extremes	

Lifting Demands*	Choose an item.
Additional Physical Demands or Work Conditions:	Click or tap here to enter text.
Frequency of Travel*	Choose an item.
Work Schedule (if not typical or specified)	Click or tap here to enter text.

## ADDITIONAL REQUIREMENTS

**Background/Education Check:** A criminal background check will be completed as a condition of employment. Education checks are processed for positions requiring a formal degree as a minimum requirement. Reference checks will be conducted.

**Equal Employment Opportunity:** Western Oregon University is an equal opportunity employer that is committed to diversity, equity and inclusion in the workplace. We celebrate our inclusive work environment and encourage people of all backgrounds and perspectives to apply.

We embrace our differences and know that our diverse team is a strength that drives our success.

**Accommodation Requests:** Western Oregon University is committed to developing a barrier-free recruitment process and work environment. If you require any accommodations, please email us at [employment\[at\]wou.edu](mailto:employment[at]wou.edu) and we will work with you to meet your accessibility needs.

### Acknowledgement:

Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date

Appointing Authority	Appointing Authority Signature / Date

HR USE ONLY:

Received by:	Date

Position Class #:	Employee Class	Job Location	Appointment Percent
CUPA-HR#/Title	NOC Code	Category Code	SOC Code
Actions Taken			
<input type="checkbox"/> NBAPBUD/NBAPOSN <input type="checkbox"/> NBAJOBS <input type="checkbox"/> PEAFACT <input type="checkbox"/> Electronically Filed			

NOTES: