



OPENING FOR  
**FINANCIAL SERVICES GENERALIST**  
 ASI FINANCIAL SERVICES

ANTICIPATED HIRING RANGE: **\$41,000 - \$43,000 annually**  
 Anticipated Total Compensation Package with Benefits: \$67,488 - \$69,639  
 \*based on health insurance coverage for employee + family

***This is an hourly, non-exempt, full-time position that is eligible for [benefits](#).***

**THE POSITION**

Under the supervision of the Director of Financial Services, the Financial Services Generalist maintains open and constant communications with all staff in Financial Services to obtain general knowledge of all aspects of the department including budget, accounts receivable, accounts payable, accounting, etc. Examples of general knowledge that the Financial Services Generalist is expected to have include budget deadlines for clubs, councils, departments, annually budgeted groups, IRA, etc., status of various transactions including budget posting, club registration (with respect to signature card & Agency Agreement), disbursement requests (DRs), purchase orders (POs), etc., and basic understanding of forms, policies and procedures.

The Financial Services Generalist provides oversight to the Student Cashiers who are responsible for a wide variety of customer inquiries and requests as well as general administrative duties. The Financial Services Generalist also serves as the primary point of contact for the window to filter more in-depth questions and requests to other staff in Financial Services. The Financial Services Generalist may also be asked to provide support to other areas within Financial Services at the discretion of the Director of Financial Services.

**ESSENTIAL DUTIES**

<p><b>Supervisory &amp; Training Responsibilities</b></p> <ul style="list-style-type: none"> <li>• Supervise Student Cashiers to ensure that they fulfill their duties and responsibilities</li> <li>• Provide on-the-job training and training workshops to Student Cashiers. Training workshops may be developed in collaboration with other staff in Financial Services.</li> <li>• Manage student schedule to provide adequate coverage for the window</li> <li>• Prepare performance evaluation for students</li> <li>• Recruit Student Cashiers as need</li> <li>• Prepare performance evaluation for Student Cashiers</li> </ul>	<p>35%</p>
<p><b>Window Customer Service</b></p> <p>The Financial Services Generalist, with the assistance of Student Cashiers, provides services in the following areas:</p> <ul style="list-style-type: none"> <li>• Respond to a variety of customer inquiries and requests for information in a timely and professional manner</li> <li>• Open and close the customer service window as scheduled</li> <li>• Supervise student cashiers to handle cash transactions and balance daily cash drawer</li> <li>• Supervise student cashiers to receive, review and log DRs, POs and other documents</li> <li>• Inform customers the various budget deadlines for clubs, councils, departments, annually budgeted groups, IRA, etc.</li> <li>• Provide status update on budget posting, club registration (with regards to signature cards &amp; Agency Agreement), DRs, POs, etc.</li> <li>• Provide instructions and guidance to customers regarding ASI policies, procedures,</li> </ul>	<p>20%</p>

<ul style="list-style-type: none"> <li>various business forms</li> <li>• Provide coverage at the window as needed</li> <li>• Handle customer complaints and provide update to other members in the department as appropriate</li> </ul>	
<b>AP, AR, Accounting, Budget &amp; General Office Support</b> <ul style="list-style-type: none"> <li>• Provide general office support and support to other areas in Financial Services as directed by the Director of Financial Services</li> </ul>	20%
<b>Communication</b> <ul style="list-style-type: none"> <li>• Maintain open communication with all staff in Financial Services to obtain general knowledge of all aspects of the department including budget, accounts receivable, accounts payable, accounting, etc.</li> <li>• Examples of general knowledge include budget deadlines for clubs, councils, departments, annually budgeted groups, IRA, etc., status of various transactions including budget posting, club registration (with respect to signature card &amp; Agency Agreement), disbursement requests (DRs), purchase orders (POs), etc., and basic understanding of forms, policies and procedures.</li> <li>• Filter more in-depth customer inquiries and requests to the appropriate staff in Financial Services</li> </ul>	10%
<b>Policy &amp; Procedures</b> <ul style="list-style-type: none"> <li>• Stay current with the latest ASI &amp; Financial Services policies and procedures</li> </ul>	10%
<b>Other</b> <ul style="list-style-type: none"> <li>• Performs other duties as assigned</li> </ul>	5%

## QUALIFICATIONS

- Equivalent to an AA degree in accounting or related fields; bachelor's degree preferred
- Minimum three years of experience in customer service, banking, accounts receivable, accounts payable, or accounting
- Ability to review the work of staff and provide guidance and constructive feedback
- Knowledge of basic math, including fractions, percentages, and simple interest
- Thorough knowledge and understanding of general office and financial record keeping methods, procedures and practices
- Demonstrated ability to work with an ethnically diverse and culturally pluralistic student population and campus community
- Exceptional interpersonal skills
- Ability to establish and maintain effective and cooperative working relations
- Ability to interact effectively with customers, students, campus community members, vendors and the general public
- Ability to operate an office work station, utilizing word processing, spreadsheet and accounting software
- Ability to communicate clearly and concisely, both orally and in writing
- Ability to work in a very organized and detail-oriented way
- Ability to perform diversified duties involving wide range of procedures
- Ability to work effectively and accurately under pressure
- Ability to use initiative and judgment
- Ability to satisfactorily complete a background check (including a criminal records check)

## POSITION SENSITIVITY

Based on the duties and responsibilities of this position, this position has been designated to be a sensitive position with access to sensitive data.

## **BACKGROUND CHECK**

A background check (including a criminal records check) must be completed satisfactorily before any candidate can be offered a position with Associated Students, Inc., Cal Poly Pomona. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current ASI employees who apply for this position.

## **WORKING ENVIRONMENT**

Frequently required to sit, talk and hear; manual dexterity, eye-hand coordination and verbal communication; use of office equipment: telephones, calculator, copier and fax.

## **APPLICATION PROCEDURE**

Both an application and resume are required. A resume does not replace the information requested on the application form. Applications are available on the [ASI Website](#) and in the Human Resources Department.

Submit resume and application to:       Associated Students, Inc.  
Human Resources Department  
3801 W. Temple Ave., Bldg. 35  
Pomona, CA 91768

Phone: (909) 869-3546

E-mail: [asihr@cpp.edu](mailto:asihr@cpp.edu)

Position open until filled. The provisions of this bulletin do not constitute an expressed or implied contract. Any provision contained in this bulletin may be modified or revoked without notice.

## **ABOUT ASI**

Established in 1963, Associated Students Incorporated (ASI), is a recognized auxiliary organization of Cal Poly Pomona that is led, funded and mainly staffed by students. Guided by the core commitments to the promotion of student development and provision of quality facilities, programs and services, ASI provides for student representation at the campus and system-wide level and offers leadership development through student government, student-led programming, student employment and student involvement in a wide array of programs and services. ASI fully supports the enrichment of student life by providing annual funding support for student clubs and organizations, diversity programs, athletic scholarships and academic support programs.

## **EOE**

ASI is an Equal Opportunity Employer. Please notify the Human Resources Department for reasonable accommodation requests during the selection process

## **MANDATED REPORTING REQUIREMENT**

In compliance with the California Child Abuse and Neglect Reporting Act (CANRA) and the [CSU Executive Order 1083](#), each ASI employee is designated as a mandated reporter and is required to sign an Acknowledgment of Mandated Reporter Status and Legal Duty to Report Child Abuse and Neglect.