

FINANCIAL AID ADVISER SERIES

<u>Code No.</u>	<u>Class Title</u>	<u>Occ. Area</u>	<u>Work Area</u>	<u>Prob. Period</u>	<u>Effective Date</u>	<u>Last Action</u>
0052	Financial Aid Adviser	04	078	6 mo.	10/15/12	Rev.
0053	Financial Aid Adviser Coordinator	03	078	6 mo.	10/15/12	Rev.
0054	Financial Aid Adviser Manager	03	078	12 mo.	10/15/12	Rev.

Promotional Line: 201

Series Narrative

Employees in this series perform duties involved in the operation of campus student financial aid programs and/or technical, supervisory, or administrative functions in the management of the programs.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Financial Aid Adviser 0052

Employees at this level serve as the initial contact for students, parents, and university members of student financial aid. They also interview applicants and explain information to applicants and recipients of student financial aid. They work under general supervision from a designated supervisor.

A Financial Aid Adviser typically –

1. explains the information on Financial Aid Award letters, loan processes, status of applications, disbursement procedures, satisfactory progress requirement and appeal procedures, cost of attendance, and out-of-pocket expenses, the availability of jobs, loans, and scholarships
2. directs calls, visitors, or emails to university wide resources as appropriate (billing, scholarship, student employment, housing, etc.)
3. assists in reviewing all forms received and preparing necessary forms including assisting with the completion of the online financial aid application process
4. interviews applicants, parents, and other interested persons regarding need for and participation in student financial aid programs
5. assists in or individually determines an applicant's basic eligibility for available financial aid
6. interprets procedures and criteria for the qualification of applicants
7. interprets complex personal situations and suggests further review by the Financial Aid department as appropriate (i.e. Income Appeal/computer purchase/cost of attendance appeal/satisfactory academic progress appeal)
8. maintains permanent records, accounts, and personal history files
9. sends award notifications (e.g., postcards, emails, etc.)
10. receives, reviews, and distributes all incoming correspondence

11. may supervise and assist in training student workers; may assist with scheduling staff and student workers
12. notifies external servicing centers (e.g., the National Student Loan Data System, as required by Federal law) of all mid-year transfer students
13. analyzes data from various agencies (e.g., NSLDS, COD, ISAC, etc.) to determine if Federal Direct Student Loans and Federal Pell Grants awarded must be reduced to avoid overpayment
14. participates in advisory committees and workshops
15. represents the financial aid office during recruitment events (i.e., Open House Day)
16. performs other related duties as assigned

Level II: Financial Aid Adviser Coordinator**0053**

Employees at this level provide assistance in carrying out the technical functions in the management of student financial-aid programs. They work under general supervision from a designated supervisor.

A Financial Aid Adviser Coordinator typically –

1. verifies student eligibility criteria for Federal Title IV and Illinois financial aid; assists students with suggestions for locating institutional grants and scholarships; works with students and agencies to resolve discrepancies
2. oversees all aspects of the file management system
3. manages correspondence and provides general financial information concerning account receivables, Tuition Assistance, and other financial programs to students, parents, staff, and outside agencies
4. assists in the development and implementation of intra-office procedures, rules, and policies; analyzes clients needs and recommends policy changes to administrators
5. reviews and awards financial aid applicants in accordance with federal, state, and institutional regulations and policies.
6. monitors student's eligibility to receive financial aid (satisfactory academic progress, limitation of entitlements, verification, etc.)
7. participates in the development of forms, letters, and brochures needed to collect financial aid data from student applicants
8. reviews changes in regulations affecting various campus-based programs, guaranteed loans, state grants and institutional programs; recommends changes in procedure to meet changing regulation needs
9. serves as a liaison with other University organizations that work with the Financial Aid Office and outside agencies
11. assists with the direction, management, and administration of scholarship and grant programs

12. supports lower-level employees/students and coordinates, schedules and provides in-service training and staff meetings as delegated
13. prepares and coordinates the preparation of statistical, operating, and planning records and/or reports; maintains spreadsheets for various institutional programs for tracking and balancing purposes; ensures accuracy, completeness, and compliance with regulations
14. processes and tracks all verification documentation submitted to the Office of Financial Assistance; enters all required corrections
15. performs accounting functions related to grant and scholarship accounts which may include reconciling awards and payments/transactions (e.g., in Banner or AIS)
16. performs duties of the lower-level in this series as required
17. performs other related duties as assigned

Level III: Financial Aid Adviser Manager**0054**

Employees at this level perform administrative, supervisory, and technical functions in the management of student financial aid programs. They work under administrative supervision from a designated administrator.

A Financial Aid Adviser Manager typically –

1. Supervises all phases of the operation of student financial-aid programs (including, but not limited to, edits, verification, changes/corrections, packaging, eligibility determination and monitoring, awarding, over award monitoring and disbursement)
2. Responsible for training, supervising and evaluating the work performance, effectiveness, productivity, and accountability of lower-level employee engaged in the reception, interviewing, counseling, and processing of applicants for financial aid; conducts in-service training and staff-meetings
3. Participates in supervising the administration of a financial aid department (i.e., short-range and long-term planning, development of office goals and objectives, and development and implementation of policies and procedures for financial aid programs and the Financial Aid Office)
4. Provides technical expertise, researches references to resolve technical problems or questions and alerts their supervisor to unresolved technical problems
5. Coordinates financial aid processing with external agencies and assists in complying with reporting requirements
6. Supervises the preparation of statistical, operating, and planning records and/or reports
7. Proposes and develops compliance procedures; analyzes federal and state processing specifications on an ongoing basis
8. Responsible for the alternative loan packaging process by determining eligibility, awarding, and performing data entry - including the management of certification of alternative loans

9. Analyzes, visualizes, creates and applies new computer aided techniques and acts as project manager
10. Assists in evaluating appeals for professional judgment overrides
11. Responsible for developing training materials and conducting formal training within their office or department
12. Participates in the activities of various professional organizations (i.e. MASFAA, ILASFAA, etc.) to stay current with strategic partner needs and provides feedback concerning operational needs to administer programs
13. Performs duties of the lower-level in this series as required
14. Performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Financial Aid Adviser

0052

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination that equals **two (2) years (24 months)** from the categories below:
 - a. General office experience
 - b. College course work in any field
 - 30 semester hours equals one (1) year (12 months)
 - Associate's Degree (60 semester hours) equals two (2) years (24 months)
 - 90 semester hours equals three (3) years (36 months)
 - Bachelor's Degree (120 semester hours) equals four (4) years (48 months)

KNOWLEDGE, SKILLS, AND ABILITIES (KSAs)

1. Clerical knowledge (procedures and systems such as word processing, managing files and records, and other office procedures and terminology)
2. Knowledge of customer service (the principles and processes for providing customer and personal services; customer needs assessment, meeting quality standards for service, and evaluation of customer satisfaction)
3. Knowledge of the student application process
4. Judgment and decision making skills – they can consider the costs and benefits of potential actions to choose the most appropriate one
5. Mathematics and calculation skills

6. Strong written and oral communication skills
7. Ability to handle difficult and stressful situations

Level II: Financial Aid Adviser Coordinator**0053**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination that equals **three (3) years (36 months)** from the categories below:
 - a. General office experience
 - b. College course work in any field
 - 30 semester hours equals one (1) year (12 months)
 - Associate's Degree (60 semester hours) equals two (2) years (24 months)
 - 90 semester hours equals three (3) years (36 months)
 - Bachelor's Degree (120 semester hours) equals four (4) years (48 months)
3. **One (1) year (12 months)** of experience in working with student employment, student financial aid/loans, student admissions/recruitment, scholarship/grant programs or other closely related work experience

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of customer service (the principles and processes for providing customer and personal services; customer needs assessment, meeting quality standards for service, and evaluation of customer satisfaction)
2. Extensive knowledge of financial-aid programs and of university academic requirements and parameters
3. A working knowledge of office technology (word, excel, and necessary databases)
4. Knowledge of the student application process
5. Knowledge of Federal and State regulations pertaining to all financial aid programs and of the resources available to research complex issues
6. Strong written and oral communication skills
7. Mathematics and calculation skills
8. General accounting skills
9. Judgment and decision making skills – they can consider the costs and benefits of potential actions to choose the most appropriate one
10. Ability to handle difficult and stressful situations

11. Supervisory ability
12. Ability to interpret complex regulations from within and outside of the University
13. Ability to handle a large volume and a variety of details accurately and set priorities
14. Ability to adapt in an ever-changing environment

Level III: Financial Aid Adviser Manager**0054**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination that equals **three (3) years (36 months)** from the categories below:
 - a. General office experience
 - b. College course work in any field
 - 30 semester hours equals one (1) year (12 months)
 - Associate's Degree (60 semester hours) equals two (2) years (24 months)
 - 90 semester hours equals three (3) years (36 months)
 - Bachelor's Degree (120 semester hours) equals four (4) years (48 months)
3. **Three (3) years (36 months)** of experience in working with student employment, student financial aid/loans, student admissions/recruitment, scholarship/grant programs or other closely related work experience

Note: An applicant with a Master's degree qualifies with one (1) year (12 months) of experience

KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of customer service (the principles and processes for providing customer and personal services; customer needs assessment, meeting quality standards for service, and evaluation of customer satisfaction)
2. Extensive knowledge of financial-aid programs and of university academic requirements and parameters
3. A working knowledge of office technology (word, excel, and necessary databases)
4. Knowledge of the student application process
5. Knowledge of Federal and State regulations pertaining to all financial aid programs and of the resources available to research complex issues
6. Strong written and oral communication skills with an understanding of organizational policy and procedure theory

7. Mathematics and calculation skills
8. General accounting skills
9. Judgment and decision making skills – they can consider the costs and benefits of potential actions to choose the most appropriate one
10. Ability to handle difficult and stressful situations
11. Supervisory ability
12. Ability to interpret complex regulations from within and outside of the University
13. Ability to handle a large volume and a variety of details accurately and set priorities
14. Ability to adapt in an ever-changing environment
15. Ability to coordinate activities of a staff